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30 July 1976

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Home news

£13.3m profit for Airports Authority

The British Airports Authority marked its 10th anniversary with the announcement of a pre-tax profit of £13.3 million for the financial year 1975/76.

Income and profit have increased nearly five-fold since the authority was formed in 1966, Nigel Foulkes, the chairman of the BAA said in an introduction to its annual report* published this week.

Enlarging on the year's financial figures Mr. Foulkes added: 'The results for 1975/76 were substantially better than in the previous year. Profit before interest and tax rose from £10.3 million to £16.8 million and the return on net assets from 11.5 per cent to 15 per cent.'

Despite substantial increases in landing fees and an upturn in passenger traffic there was still a traffic operations loss of £2.8 million. But profits from commercial operations grew by 35 per cent to £19.6 million.

'No airline can be expected to applaud an airport owner's landing charges but I think the BAA can claim that its policy makes sense,' Mr. Foulkes pointed out.

'We try to make most of our profit on commercial activities and to hold landing fees at a level which makes a small return on the current investment in traffic services. The bulk of our future investment is financed, not by an impost on the travellers' flight ticket, nor by large loans of taxpayers' money, but by the passengers' voluntary purchases in our airports.'

Mr. Foulkes said the first 10 years had been a period of rapid change for the BAA and the air transport industry. The decade had seen the swift growth of mass leisure traffic in the first eight years, a market slowed down in the last two by the oil crisis and world recession. The arrival of wide-bodied jets switched the pressures on airports dramatically from the runways to the terminals, and fierce environmental controversy centred on the siting of new airports and on the expansion of existing ones.

Total passenger traffic at the BAA's seven airports increased by 6.7 per cent, almost 3 per cent higher than the level reached in 1973/74 before the oil crisis and world recession. But air transport movements (excluding helicopters) declined yet again, by 1.5 per cent, reflecting the airlines' efforts to improve load factors and the use of larger aircraft.

For the future, Mr. Foulkes said the BAA is pressing on with its plans to meet traffic growth in the next 10 years while still awaiting the Government's strategy for the 1990s. Further improvements must be made to the three terminals at Heathrow, a fourth provided to increase capacity, and the major expansion of Gatwick completed. In Scotland, the three Lowland airports of Glasgow, Prestwick and Edinburgh will be capable by 1977 of handling three times the present traffic of 3.5 million passengers. The Scottish Airports Division is expected to make a reasonable trading profit in the near future as the first step towards becoming financially self-supporting.

* The BAA Annual Report and Accounts – 1975/76, price £3, HMSO or The Library, BAA, 2 Buckingham Gate, London SW1E 6JL.

Road haulage 'subsidised' say BR

Dramatic savings could be made by shifting a large amount of long-distance freight traffic from road to rail. This is one of the main claims of the British Railways Board in its reply 'An Opportunity for Change', published this week, to the Government's Transport Policy Consultation Document.

Heavy road haulage, Railfreight's direct competitor, claims the Board, is being subsidised by other road users, and is further protected by UK resistance to EEC transport requirements on, for instance, drivers' hours.

It feels that the true position is 'utterly distorted' by calculation in the document based on the impact of transfer from a basis of total road traffic, including all local collection and delivery movements which the railway was never intended to perform.

'What the total road traffic figure obscures', says the Board, 'is the fact that two-thirds of all road freight tonne-mileage is accounted for by the truly heavy lorry, and more than half of this – 20,000 million tonne-miles – is made up of transits over 100 miles. The Board calculates that the transfer of only 40 million tonnes of this traffic could reduce the tonne-mileage of heavy lorries by nearly 20 per cent, and of long distance heavy lorries by as much as 35 per cent.

The 116 different projects already submitted to the DOE for consideration for private siding grants represent the potential transfer of 1,600 million tonne-miles – 4 per cent of the total heavy vehicle road tonne-mileage.

The Board believes that both short and long-term prospects for the freight business will be correspondingly brighter the more the terms of competition are changed to reflect true costs; the Board points out that the Consultation Document itself confirms that the cost of road provision and maintenance attributable to heavy lorries are substantially in excess of the taxes levied on their use.

In the Board's view, control of Freightliners Ltd., should be returned to British Rail – by giving the Board a 51 per cent shareholding – so that the rail container operation can be planned and marketed as part of the Railfreight business.

British Rail chairman, Sir Richard Marsh, says that: 'Unless we obtain a more rational and consistent policy for the railway, the taxpayer will be faced with even higher bills for a declining railway. That need not happen.'

In its other main recommendations, the Board calls for changes in the way railways are financed; forecasts a drop of 60,000 (15 per cent) in the number of commuters to Central London if a policy of making the services cover their costs by 1981 is followed; suggests that some loss-making railway services could be operated by buses (but calls for a parallel withdrawal of bus services which compete directly with rail Inter-City services); looks for a 20 per cent cut in manpower by 1981; and urges higher investment to prevent gradual decay of the railway system.

Criticism is expressed that the Consultation Document lays down financial constraints, which, if taken as the starting point, restrict the policy options to those which cost the least in the short term.

'It would be tragic if this led to a national transport system not geared to the needs of the next decade, and thus itself a barrier to economic growth and social development,' comments the Board, which suggests that a long term forecast of demand be made, followed by the development of a range of options, each with a time-scale, a price tag and a pay-off. 'The option with the highest pay-off may not be the one chosen if the time-scale for implementation is too long and the price of change too high', says the Board.

Since 1974, BR has been engaged on a series of strategic studies – still in progress – which indicate a 50 per cent growth in Railfreight carryings by the year 2000, and growth in leisure travel increasing the use of off-peak passenger services. Results from these studies so far have considerably influenced the busi-

ness strategies set out in the Board's response.

A second study identified a hypothetical 'basic railway' – the main Inter-City passenger, bulk freight and parcels flows with a long-term future – to which various 'optional extras' could be added. The basic railway, so defined, proved to be a very substantial one. The process of evaluating these additions to the basic railway needs to be carried out jointly with government, says the Board, but asks that there should be less detailed involvement of government officials in authorising individual projects, but more government involvement in the process of corporate planning, which tests and develops the plans on which the investment is based.

Leasing costs now eligible for Industry Act assistance

The costs of leased plant and machinery will in future be included in assessments for selective financial assistance, if the leasing arrangement is for a minimum term of four years.

Previously the cost of leased assets has not been included in the eligible costs of a project which can qualify for assistance under Sections 7 and 8 of the 1972 Industry Act.

Announcing this change in a written answer to a parliamentary question from Michael McGuire (Ince), Alan Williams, Minister of State, Department of Industry said: 'From 27 July the cost of plant and machinery leased for a minimum term of four years will be included amongst eligible project costs for the purpose of determining the appropriate level of selective assistance. This change will apply for projects eligible for regional selective assistance under Section 7 of the Industry Act and for projects eligible for selective assistance under the accelerated projects and sectoral industry schemes introduced under Section 8 of the Industry Act.'

Marshall Richards Barcro to provide additional jobs in north-east

The Department of Industry has agreed to provide up to £300,000 by way of grant to Marshall Richards Barcro under Section 7 of the Industry Act 1972 to assist the reorganisation of the company at Crook.

Marshall Richards Barcro, a wholly owned subsidiary of Thomas Ward, manufactures wire drawing and tube drawing machinery. It has its main manufacturing establishment at Crook and its design, development, and sales force at Eastleigh, and the reorganisation includes the transfer of the Eastleigh activities to Crook. The move of the Eastleigh activities to Crook is essential to the future of the company and will result in approximately 100 new jobs at Crook.

Ebbw Vale advance factory allocated

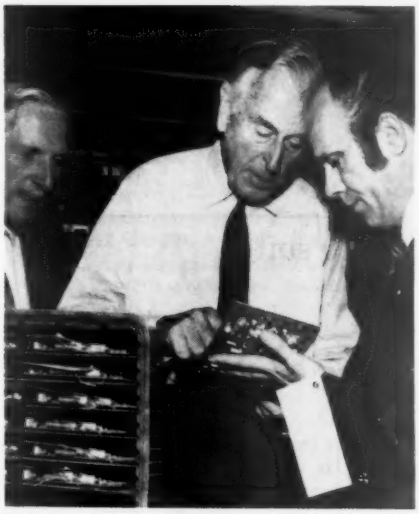
John Morris, Secretary of State for Wales, has announced that a 930 m² (10,000 sq. ft.) government advance factory at Cwmdraw, Ebbw Vale, has been allocated to Caristrap (UK) Ltd.

Caristrap (UK) Ltd. will manufacture industrial strapping and the tools, accessories and machines for its use. It expects to employ 20 workers in the first year and to build up to at least 50 at the end of three years. It is anticipated that about 80 per cent of the work force will be male.

The Caristrap Corporation was set up by Dr. T. J. Karass, a Canadian citizen and a native of Hungary, in 1948 to manufacture tapes and ribbons. Caristrap currently has a turnover of between 15 and 20 million dollars a year, with world-wide patents on its products.

The Cwmdraw advance factory was first announced by the Secretary of State for Wales in March last year. Construction work started in August and was completed by the Welsh Development Agency last April.

Commenting on the announcement, the Secretary of State said: 'It is gratifying that foreign-based industries are looking to areas such as Ebbw Vale as locations for expansion of their activities in the UK.'



Earl Mountbatten of Burma, at the Spon Street, Coventry works of GEC Telecommunications Ltd., discussing printed circuit manufacture and assembly techniques with production line manager Pat Walsh (right) and Douglas Morton (left) managing director. The printed circuit board they are examining is used in sophisticated high-speed digital transmission equipment now in quantity production. The Spon Street factory is the main manufacturing plant of GEC Telecommunications Ltd. Transmission Division which is currently exporting some 50 per cent of its output. Earl Mountbatten, is chairman of the National Electronics Council.

Carafes of wine to be sold in prescribed quantities

The Weights and Measures (Sale of Wine) Order 1976, made on 19 July, has been approved by both Houses of Parliament and published.

The Order, which will take effect from 1 January 1977, will require wine in carafes for consumption on the premises to be sold only in the following prescribed quantities: 25cl, 50cl, 75cl and 1 litre, or 10 fl. oz and 20 fl. oz. The Order will also require the display of a written statement showing the quantities in which wine in carafes is offered on these premises.

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INDUSTRIAL & COMMERCIAL PROPERTY

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£2.10 suits

Michael Meacher, Parliamentary Under-Secretary of State for Trade, issued a statement on 26 July about the claim by the Clothing Manufacturers' Federation that Taiwanese suits were being imported at a landed price of £2.10. He said:

'My department has investigated the CMF allegation made this month that Taiwanese suits are being landed in the UK at £2.10 per suit.

'As will be borne out by the import statistics, there have been no imports since February.

'We understand that these were not conventional suits at all. They were rainsuits of the type worn by fishermen, golfers, cyclists, yachtsmen and other sportsmen. It seems highly unlikely that they are being sold for prices anything like as high as the £40 which has been quoted.

'I very much regret the misinformed publicity that has been given to this matter; it is reminiscent of the publicity given earlier this year about the "£4.80 suit", alleged to be flooding into the country whereas events established that none had been imported and that there was no way by which they could be imported.'

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Report on insurance business for 1975

Last year was a better one for Britain's insurance industry than 1974. But, says the Department of Trade in its annual report on the working of the Insurance Companies Act, published on 28 July, inflation remained a serious problem.

Says the report: 'In 1975 there was some relief from the economic difficulties that affected the UK insurance industry in 1974. The fall in property values eased off, and the fall in the value of securities was reversed, so that at the end of 1975 insurance companies' assets were stronger than at the beginning of the year.'

Inflation, the report says, remained a serious problem, and its implications for the expenses of all companies and for the claims provisions of those conducting certain classes of general business were being watched with particular attention. Because of the strengthening of assets, fewer companies appeared to experience difficulties in 1975 than in the previous year.

But new asset valuation regulations, which came into force during the year, imposed a stricter basis for the valuation of assets and there were still cases where, for this or other reasons, Government intervention was necessary.

During the year 27 companies (41 in 1974) were persuaded to take remedial action on a non-statutory basis. In some of these cases, shareholders provided additional capital and in others additional funds were provided from outside.

Last year, the then Secretary of State for Trade invited the four major insurance brokers' organisations to consider the possible regulation of insurance broking, and to submit proposals.

The four have made a preliminary report and have been asked to amplify it in certain respects. The Department has also invited the leading insurance companies' organisations to gather information on their members' current practice in appointing and training agents.

The annual report says that before any decisions are reached on the appropriate way to deal with these matters, insurers, consumers' organisations and others likely to be affected by the proposals will be consulted.

This report appears in a new format and contains more information than the eight previous annual reports.

The report also looks at Lloyd's; compulsory insurance against oil pollution; application of price control to insurance premiums; the Policyholders' Protection Act and the way in which policyholders' complaints have been handled.

Raw material movement and retail prices

A report on 'Raw material movements and retail prices', published by the Price Commission on 29 July, contains a description of ways in which movements in the costs of raw materials affect prices in shops. In addition, case-studies show the effects of these movements on typical manufactured goods. The report (No. 17) is available from HMSO price 80p.

Company investigation report published

The Inspectors' report on the affairs of Dwell Constructions Ltd; Yorks and Lancs Construction Company Ltd; Southern and Provincial Estates Ltd; Southern and Provincial Investments Ltd; and Boulters Court Developments Ltd. has now been published.

The Inspectors, R. G. Waterhouse and J. C. Steare were appointed on 2 July 1969 under the provisions of Section 165(b) of the Companies Act 1948, to investigate the affairs of Dwell Constructions Ltd. and Yorks and Lancs. Construction Co. Ltd.

The Inspectors were also appointed on 29 July 1969 under the provisions of Section 165(b) of the Companies Act 1948, to investigate the affairs of Southern and Provincial Investments Ltd. and Southern and Provincial Estates Ltd.

On 7 September 1970, the Inspectors were appointed under the provisions of Section 165(b) of the Companies Act 1948 to investigate the affairs of Boulters Court Developments Ltd.

The report was submitted on 1 July 1975 and is published in four volumes. A limited number of copies are available (cash with order) from the Department of Trade Library, 1 Victoria Street, London SW1, price £26.00 post free (Volumes I and II (Text) £9.75, Volumes III and IV (Appendices) £16.25). Copies may be inspected at the Department of Trade Library (by prior appointment only), or at Official Receivers' Offices at Bradford, Hull, Leeds, Liverpool, Manchester, St. Annes and Sheffield between 10 a.m. and 4 p.m. Monday to Friday.

Edmund Dell replies to chairman of Stock Exchange

Edmund Dell, Secretary of State for Trade, replied on Tuesday to Nicholas Goodison, chairman of the Stock Exchange, on the subject of inspector's reports under the Companies Acts.

In his letter Mr. Dell said he shared the views of Mr. Goodison on the importance and value of the system of company inspections in this country. The procedures advocated by the Court of Appeal (in the Pergamon Press case in 1974) had been followed in spirit and to the letter. This did not mean that there was no room for improvement and the Secretary of State would certainly study with the greatest care the suggestions which had been made in recent weeks.

He also said that the Department of Trade would hold in the autumn a conference of inspectors (as a sequal to a similar conference held two years ago) to discuss the procedures and consider what changes might be made.

Chancellor announces cuts in public expenditure

Cuts of up to £1 billion in public spending programmes were announced in Parliament on 22 July by Denis Healey, Chancellor of the Exchequer. The main impacts of the measures in industry will be: more emphasis on selective rather than general assistance to industry; consideration of the need for more selective import restraints; changes in Regional Employment Premium; savings to be made in Regional Development Grants; savings on capital investment programmes for all nationalised industries' capital investment programmes (excluding the British National Oil Corporation) and faster phasing out of food subsidies.

Extracts from the Chancellor's statement of particular interest to readers of *Trade and Industry* are published below.

'Our overriding priority' said the Chancellor, 'is to restore the prosperity of the British economy through the regeneration of our industry and to provide the essential conditions to bring down, and to keep down, the intolerable level of unemployment. To do this we must ensure that manufacturing industry has sufficient resources available to take advantage of the exceptional opportunities open to us in the export field; we have got to get our rate of inflation down to the level of our competitors' and hold it there; and we have got to do both in a way which will protect the poorest and weakest of our people and retain the social consensus on which the success of all our policies depends.

Vigorous growth in exports

The Chancellor said that, led by a vigorous growth in exports, the recovery in GDP had proceeded faster than he had expected at the time of the Budget.

'The balance of payments on current account, however, remains in substantial deficit,' he said. 'The 12 per cent depreciation of sterling since March will inevitably worsen the balance of payments in the short term, and make it more necessary than ever for us to maintain the confidence of those from whom we may have to borrow to finance our external deficit. On the other hand the increase in our exports and in import substitution deriving from our increased competitiveness will later bring a massive improvement.

'In fact we now have a unique opportunity for export-led growth, something we have sought in vain ever since the Second World War.

'There are two possible threats to our success. In the previous cycle an excessive rate of growth in manufacturing production led quickly to supply constraints and bottlenecks in many sectors of industry. We also suffered from an excessive growth of the money supply. We saw a price explosion and an unacceptable deficit on our balance of payments. We will not let this happen again.

'Given the economic prospect as we now see it, we intend that the PSBR for1977/78 shall be reduced to £9 billion or less . . . and I am announcing now, in advance of the usual White Paper, public expenditure reductions of £1 billion at 1976 Survey prices for 1977-78, which will be the crucial year for recovery.

'In deciding where the reductions of £1 billion should fall the Government have avoided mechanical cuts across the board. The main purpose of our measures is to allow manufacturing industry to take the maximum advantage of the opportunities now presented to it. Because of the priority which the Government are giving to the industrial strategy, we have been concerned to avoid damaging the trade, industry and employment programmes.

'We intend to move towards putting emphasis on selective, as against general, assistance to industry. We plan therefore to increase significantly the resources available for selective assistance to industry through the NEB and the Scottish and Welsh Development Agencies, as well as from the Government direct, so as to support the work on the industrial strategy now under way in NEDC. Our experience shows that this is the most cost-effective way of helping to achieve the reversal of our post-war industrial decline. As part of this policy of selective support for industry, the Government will also watch vigilantly the need for an extension of its existing selective import restraints to provide temporary protection to viable industries faced with unfair foreign competition. We have already taken action and we are anxious to discuss with both sides of industry the need for further action of this kind.

'In some areas we have already increased provision for public expenditure, especially for the Department of Employment's programme, including funds provided to the Manpower Services Commission for training. In addition, we are prepared to make provision, within the revised programme, for a possible Government contribution in 1977/78 to the collective funding of any scheme of apprentice training which may emerge from the public discussion of our recent Consultative Document on that subject. We shall be announcing before the recess further measures to help with the serious problem of unemployment among young people.

'This shift of emphasis towards selective assistance to industry, will require savings in expenditure of three kinds. First, Regional Employment Premium is at present £3 for men and £1.50 for women: in future it will be at a single rate of £2 for both. Second, we will introduce legislation to reduce the employer's rebate from the Redundancy Fund from 50 per cent to 40 per cent. Third, savings will be obtained on regional development grants by imposing a delay of some three months in payment of approved claims. We also propose to concentrate these grants in future on manufacturing investment by withdrawing elegibility from the construction and mining industries, the location of which for the most part is not determined by any incentive.

'Apart from further selective action still to be decided, the net effect of all these measures will be to reduce the trade, industry and employment programmes in 1977-78 by £105 million.

'Net savings of £157 million will be made on the capital investment programmes of the nationalised industries other than BNOC. These savings are spread between the industries and should not affect the main industrial objectives of any of them.

'We believe the time has now come to review the treatment of the nationalised industry programmes generally in our public expenditure figures so as to bring our practice more closely into line with that of other countries. The Expenditure Committee will of course be consulted on this review. No general change will be made until it is completed. Meanwhile we are treating BNOC as a special case.

Food subsidies

'Our existing plans envisaged that food subsidies would be largely phased out by 1978-79. This process will be accelerated, to save £80 million in 1977-78. The effect of this acceleration on the RPI will be only about 0.1 per cent.

'The Government have decided to save £5 million on overseas services other than aid in 1977/78.

'A reduction of £35 million will be made in Northern Ireland. Some £3 million of this is the result of the new equalised rate of regional employment premium. The remainder of the cuts will be spread widely over the different Northern Ireland programmes.

'In those cases where the reductions I have announced fall on the spending of authorities other than central Government, the necessary consultations about the form of the savings will be initiated at once. Where Parliamentary authority is required, the necessary Bills or Orders will be introduced in due course.

Turning to taxation, the Chancellor said: 'I shall of course have to make my usual Budget judgement in 9 months' time, next spring, when the course of the economy in the following year can be predicted more surely. However, in addition to the public expenditure measures which I have just announced, further action in the tax field is needed to reduce the PSBR to £9 billion. A massive increase in income tax or indirect taxation would be disastrous for our counter-inflation policy, particularly since the effects would be felt immediately in the middle of the next pay round. The Government have therefore decided instead to make an addition of 2 percentage points to the employers' national insurance contribution. This will accrue to the Exchequer. The Government will be introducing legislation early in the new Session, so that the addition can take effect from 6 April 1977. It will yield about £910 million in 1977-78 and about £1,030 million in a full year. Less than half of this will come from manufacturing industry. This sum will further reduce the PSBR in 1977-78 by about £700 million.

'The addition, like the existing contribu-

tions, will be an allowable cost for purposes of the Price Code and corporation tax. My rt. hon. Friend the Secretary of State for Prices and Consumer Protection will be announcing today the Government's decisions on the Price Code to come into effect on 1 August. These will include a rate of 50 per cent for investment relief instead of 35 per cent proposed in the consultative document and an adjustment factor of 1.4 for depreciation instead of the earlier proposal of 1.3. These further changes should contribute to industrial expansion and in themselves make little difference to prices.

'The total estimated effect of the public expenditure and tax measures I have announced is to increase the price level by about 1 per cent by March 1978, nearly two years from now.

'On current forecasts these measures will suffice to achieve the Government's objective of getting PSBR down to £9 billion in 1977-78. £9 billion would be about 6 per cent of GDP at current market prices, compared with about 9 per cent which we now forecast for this year, and nearly 10 per cent last year. It thus represents a reduction of one-third in the PSBR in the first full year of recovery. The General Government Financial Deficit, which excludes onlending to public corporations and the private sector, is the concept used by some other countries and is often quoted in international comparisons. The measures I have announced will reduce the General Government Deficit from just under 6 per cent of GDP this year to 3 per cent of GDP next year – a reduction of nearly half.

'There remains a risk that, even after the reduction in the PSBR, the necessary restraint in the growth of the money supply might result in industry being denied essential finance. I intend to ensure that that does not happen. It is essential that any increase in bank lending should be directed to priority borrowing in particular for exports, import saving, and investment and working capital for productive industry. This means that both lending and commitments for the future to customers in all non-priority categories must now be strictly limited and we shall monitor carefully what happens in these categories.

'As a result of the measures which I have announced this afternoon I now expect GDP to increase over the 18 months from the first half of 1976 at an annual rate of about 4½ per cent and manufacturing production at a rate of about 8½ per cent. These are still better figures than I was expecting at the time of the Budget. Unemployment in early 1978 will still be lower than then expected, even though the measures may by then have reduced the fall in unemployment by about 60,000. With the help of a much better balance in the public sector's finances, we can look forward to the economic recovery over the next 18 months at a pace which is both vigorous and sustainable and which will not refuel inflation.'

Changes in the Price Code

Shirley Williams, Secretary of State for Prices and Consumer Protection, told the House of Commons on 22 July about the more important points that have emerged from her consultations with interested parties on the proposed modifications to the Price Code. These were outlined in the consultative document published as a White Paper on 30 June (Cmnd. 6540).

Replying to a parliamentary question from Mr. Ioan Evans (Aberdare), Mrs. Williams said:

'In considering the representations made to me during the consultative period, which ended on 16 July, I have had principally in mind the urgent need in the coming year to promote investment and to pay for a higher level of production. First, to encourage firms to accelerate their investment plans I propose that the rate of investment relief will be increased to 50 per cent subject to careful monitoring of that investment. Provisions will be made to phase in the higher rate more quickly. Second, the adjustment factor for depreciation will be raised to 1.4 thus moving some way towards replacement cost. Third, so far as interest is concerned, I propose to give firms the option of being treated under either the rule proposed in the consultative document or the provisions of the existing Code. The productivity deduction applicable to escalation and variation of price clauses will now affect increases in labour costs up to but not later than 31 July 1976. The rules for monitoring the treatment of stock will be tightened up. To help reduce the administrative burden on smaller firms I propose to raise the lower limits of Category III above the limits proposed in the consultative document. These firms will of course still be subject to the Price Code.

'In the light of the reaction to the consultative document proposals for investment relief where equipment is leased, I propose a new provision. Relief will accrue to the owner, but he will in future be able to assign it to the lessee. Relief will no longer be given on the purchase or leasing of domestic television sets.

'A number of proposals for easing the operation of the controls have been made which I have felt unable to accept. I believe it is necessary to maintain the limitation over the retrospective recovery of costs and to prevent the undue loading of price increases between related products disproportionately to costs. The new provision for price increases to be taken in stages will be clarified to ensure that it does not permit the recovery of profit margin forgone up to now.

'I shall be making a number of alterations to the proposals contained in the consultative document designed to deal with particular points of difficulty. These will appear in the orders which will be laid on 29 July.'

Summary of main proposals

There has been extensive consultation with industrial and commercial interests prior to the publication of the White Paper. When it was published on 30 June, Mrs. Williams specifically invited comments on it from the CBI, TUC and well over 100 other organisations and firms. Many comments were received and the more important points were discussed at meetings held by the DPCP and by sponsoring departments. These consultations were concluded on 16 July.

The new Price Code – The Counter-Inflation (Price Code) Order 1976 (SI 1976/1170) – was published yesterday (29 July) to come into operation on 1 August.

In the White Paper the Government said that they estimated that the effect of the changes which were proposed in it would be to increase the Retail Price Index by about 1 per cent in the coming 12 months. The additional changes announced today do not significantly affect this estimate.

The new Price Code will be made by an order under the 1973 Counter-Inflation Act. This order, which will require Affirmative Resolutions in both Houses of Parliament, will be laid before the House this week.

Investment relief

The present rate of relief is 20 per cent; the White Paper proposed an increase to 35 per cent. The rate now proposed is 50 per cent. The extension of the relief to capital expenditure incurred by a distributor on the construction of retail shops is unchanged.

Depreciation

The White Paper proposed that firms should be able to increase the amount of depreciation of their assets by a factor of 1.3. This factor is now to be increased to 1.4.

Treatment of interest

The White Paper proposed that interest should in future be disregarded. This proposal was made in response to representations that the Code discriminated against companies which increased their resources by raising new capital rather than by borrowing. While the proposal in the White Paper was widely welcomed, it was pointed out that it would be to the disadvantage of a number of companies because they face the need to increase borrowing. Companies will in future be able to choose, on a once-for-all basis, between treating interest under the provisions of the Code as it stands at present or under the provisions of the proposals in the White Paper.

Productivity deduction

The White Paper proposed that the 20 per cent productivity deduction in the present Code should be abandoned, except for payments under escalation and variation of price clauses in contracts concluded since the introduction of the Price Code. The construction and heavy engineering industries represented strongly that this proposal was to their marked disadvantage, and that there was little if any early improvement for them in other changes proposed in the Code. The Government was persuaded by their case and it is proposed that the productivity deduction should apply to all contracts only in respect of increases in labour costs arising before 1 August next.

Categorisation

The new categories will be:

Sector	Reporting firms (Category II)	Firms required to keep records (Category III)
	£	£
Manufacturing	10,000,000	2,000,000
Distribution	15,000,000	500,000
Commercial services	7,500,000	500,000
Construction	7,500,000	2,000,000
Professional services	750,000	200,000

Cost recovery

There is no change in the White Paper proposal that the cut-off date for the retrospective recovery of cost increases will be rolled forward from 1 November 1973 to 1 January 1975.

Price flexibility

The consultative document contains new rules governing the extent to which the costs arising on a range of products can be concentrated on some of them (this is known colloquially as 'price loading'). This proposal, which codifies the anti-loading rule already in operation, came in for criticism and there have been demands for complete price flexibility. The Government considers that consumers need the reassurance that costs will not be loaded on to prices of particular goods either because the demand is relatively strong or because the market is not competitive.

Profit recovery

The White Paper proposed that firms which have not passed certain costs into prices will not be able to go back earlier than 1 January 1975 if they now wish to do so. This tightening of the present rules has also been criticised but the Government does not consider that costs which were obviously absorbed by companies at the time should now be able to appear in prices.

Staged price increases

The White Paper proposed a new rule under which companies which defer the full price increase which they could have and take that increase in stages should be able to keep the normal profit margin on each stage. There was no intention, however, that this position should be retroactive, permitting companies to go all the way back to the beginning of price control to pick up profit margin which they had lost. This limitation will be made explicit.

Stocks

The White Paper introduced relief for stock appreciation and for the valuation of stocks in proposed price increases. Mrs. Williams' answer gives notice that the requirements accompanying use by companies of the rules will be tightened in the new code and in the procedural orders in order to facilitate strict monitoring by the Price Commission.

Price Commission's report: March to May

The underlying trend in the rate of inflation is still showing an improvement, says the Price Commission in its report* to Parliament for the period 1 March to 31 May 1976.

Excluding seasonal factors, the rate of inflation is now running at an annual rate of 13 or 14 per cent. The next substantial reduction will come when the benefits of the second stage of the new pay policy work through into prices in the autumn and winter.

The report comments that the fall in the value of sterling will delay progress, but it does not pose an insuperable difficulty. The solution lies in keeping down the domestic rate of inflation, which will in due course strengthen sterling.

Profit margins in manufacture showed a real improvement in the fourth quarter of 1975. The provisional figures for the first quarter of 1976 are at a slightly lower level, but if account is taken of seasonal and other factors, the underlying trend is one of continuing improvement.

In distribution, although some sectors seem to be showing an improvement, there is no evidence yet that profit margins generally are recovering as in manufacture.

'Despite the improvements that have occurred,' says the report, 'the level of profit margins generally in distribution as well as manufacture, is too low in relation to the need for investment to safeguard the future.'

Highlights

The report shows that during the three months the commission modified, rejected or secured the withdrawal of 286 notifications of price increases from Category I and II companies, which reduced price increases by £95 million a year. Other highlights are:

about £1.2 million was secured in the form of price reductions or the absorbing of costs by larger enterprises which had exceeded their reference levels;

the commission's regional staff secured 918 general price reductions from smaller firms which had exceeded their reference levels, saving the consumer about £18.1 million; in addition, 159 individual price reductions were made following complaints from the public about particular prices;

in the case of distributors, gross profit margins were on average 2.2 percentage points below reference levels saving the consumer about £650 million a year.

Costs and prices

During the three months covered by the report the retail price index increased by 3.6 per cent bringing the increase for the 12 months to May 1976 to 15.4 per cent; the wholesale price index rose by 3.6 per cent bringing the 12-month increase to 14.7 per cent; and the commission's own index, based on price notifications received, rose by 2.3 per cent bringing the 12-month increase up to 15.7 per cent.

The report comments that the commission's index has come down progressively in successive three-month periods from 4.8 per cent to 4.2 per cent to 3.5 per cent and now to 2.3 per cent. The 12-month increase to May at 15.7 per cent shows only a small reduction compared with the 12 months to February. But this is primarily a reflection of the pattern of the monthly increases last summer. (The comparison here is 12 months not six.)

The report shows the movement in the commission's index, in the WPI and in the RPI on a six-month basis to give a better view of the underlying trend than do the figures on a three-month basis.

Excluding seasonal food, the rate of increase in the retail price index on the six-month basis fell from a peak of nearly 17 per cent for the six months to June to 6.6 per cent in December. Since then the figure has shown only very minor fluctuations; it stood at 6.7 per cent in May.

The report says that the fact that these figures seem to indicate little further improvement since December masks two factors. First, the latest figures reflect the Budget tax increases which have been absorbed without reversing the improving trend in the figures. Second, even with seasonal food excluded, prices tend to be somewhat higher in the winter than the summer.

Despite the apparent levelling out of the figures, the commission thinks that the underlying trend is still showing an improvement.

The original £6 a week pay policy made a major contribution to bringing down the rate of inflation but further benefit in the figures from this source is limited. The report then says: 'It is for this reason that the lower figures which have now been agreed for the second stage of the pay policy are so important and with this help the downward trend in the rate of inflation should be resumed.'

The value of sterling

The commission points out that the biggest danger currently to the counter-inflation programme is the fall in the value of sterling.

An earlier report – for the period to November 1975 – contained a detailed analysis of the way an excessive rate of inflation in this country leads to depreciation in the value of sterling which in turn increases the rate of inflation.

When the earlier report was written, the depreciation in sterling compared with Smithsonian parities (19 December 1971 = 100) was 30 per cent. The sharp fall in the spring brought this figure up to more than 40 per cent. That fall has been halted and to some degree reversed but, at the time of writing, the depreciation in sterling is still about 39 per cent.

The commission points out that a 10 per cent fall in the value of sterling produces a rise of about 2½ per cent in the Retail Price Index. This is the measure of the problem the country now faces.

The only real solution lies in reducing the rate of inflation, thus strengthening sterling and removing the problem at source.

* Price Commission Report for the period 1 March to 31 May 1976 (HC 551, HMSO, £1.20).

Profit margins

Profit margins of Category I companies in the fourth quarter of 1975, now revised upward to 56.4 per cent of reference levels, show a significant improvement compared with 50 per cent for the third quarter. Taken in conjunction with other evidence, particularly the improvement in the level of production, it is reasonable to conclude that profit margins are now on an improving trend.

For the first quarter of 1976, profits of Category I enterprises were 56.0 per cent of reference levels. But this figure is provisional. The commission's figures are not seasonally adjusted and profits in the first quarter tend to be low because of the pronounced seasonal pattern in certain sectors.

The apparent slight fall is not evidence of an interruption to the improving trend and the commission expects to see a continuing improvement as the year progresses. This is supported by CSO figures of gross trading profits which, seasonally adjusted, showed an improvement in the first quarter of 1976.

Profit margins of Category II manufacture and service companies increased to 54.9 per cent in the fourth quarter of 1975 compared with 51.9 per cent in the third quarter: but in the first quarter of 1976 they fell back to 53.1 per cent. Here again there is a seasonal pattern but it may well be that the recovery is coming more slowly for Category II companies than for Category I companies.

Effect of price control on level of profits

The report contains a review of the impact of three years of the price control on the level of profits and assesses the prospects for the future.

It points out that profit margins were rising before the imposition of the freeze in November 1972 and this rise continued during the freeze. In Stage 2 (April to October 1973) profit margins fell slightly from the levels reached during the freeze but they were then still marginally higher than before the freeze.

Profit margins of Category I companies – and Category II companies were broadly similar – remained remarkably stable until the summer of 1974 – a remarkable result after 18 months of price control and in the light of widespread complaints at the time about erosion of profit margins.

A dramatic fall in the profit margins of Category I companies from 71 per cent of reference levels to 52 per cent came in the third quarter of 1974 and is attributed to the breakdown of the old Pay Board policy and the dramatic upsurge in wage and salary rates in the summer of 1974 at a time when output had begun to fall.

It is however very significant that once the impact of the pay surge in the summer of 1974 had been absorbed, profit margins stabilised at the lower level indicating that although the initial loss of ground was not regained, industry did in fact succeed in passing subsequent cost increases on in prices so that no further erosion of profit margins occurred.

The commission believe that for manufacturing a sustained recovery in profit margins is now under way. Two major factors which pushed profit margins down were falling output and escalating labour costs. Both these trends have now been reversed. Output is rising and the two pay agreements have significantly reduced the rate of increase in labour costs.

Because of the various profit safeguards, the commission take the view that profit margins on controlled business could in general rise to 80 per cent of reference levels before the Code itself prevented further growth. This would bring profit margins back to the level they were in 1972 before the price control was introduced.

In the light of this, the report comments:

'The problem therefore resolves itself into two elements.

'First there is the question whether the level of profit margins before the control was introduced was adequate having regard to the need for investment. The answer is that probably it was not. This points strongly to the need, if profit margins are to be increased above the pre-control level, to linking the increase specifically to investment.

'Second there is the question whether profits conventionally calculated represent a true level of profitability and if not what can be done to ensure that they do. The answer is that they do not; but that so far as the price control is concerned, remedial action needs to be taken before the accountancy system can be reformed and this means that the remedy must be a rough and ready one.

'It is in the light of these two considerations that the amendments to the Price Code proposed in the Consultative Document need to be judged.'

Administering the Price Code

The present Price Code expires on 31 July 1976. Changes proposed in a Consultative Document, 'Modifications to the Price Code' (Cmnd. 6540) are summarised in an appendix. They are intended to come into effect on 1 August 1976. As the present control has now been in operation for just over three years, a new Appendix 9 illustrates how the control has operated over this period.

The number of Category I price increase notifications showed a modest rise in the three months to May 1976. The amount notified however shows a big fall from £540 million a month in the period to February to £361 million a month in the period to May. This very largely reflects the fact that in this period there were few increases in nationalised industry prices and increases in the oil sector were negligible.

The percentage price increase notified has also fallen from 5.6 per cent in the period to February to 4.1 per cent in the period to May. This suggests that companies are making more price increases – perhaps reflecting the pressure on profit margins; but the increases are smaller reflecting the continuing reduction in inflationary pressure.

Category II manufacturing and service companies on the other hand show small increases in both the number of notifications and the total amount notified but the percentage price increase notified shows a fall.

In all, the notification figures support the view that inflationary pressure has declined and is continuing to decline.

Profit margins

For the first quarter of 1976 profit margins as a percentage of reference levels for all Category I companies were 56.0 per cent – an apparent slight decline over the previous quarter due primarily to seasonal and other factors. Thus the food and drink sector which is subject to marked seasonal influences shows a fall from 74.3 per cent of reference levels in the last quarter of 1975 to 46.1 per cent in the first quarter of 1976; it is nevertheless much better than the 34.2 per cent for the first quarter of 1975. Other sectors, notably engineering, vehicles and metals, oil, and other manufacture which includes chemicals, textiles, paper and publishing, all show a marked improvement.

For Category II companies, it may be the case that the recovery in profit margins is coming more slowly.

The report again provides a further analysis of the wide disparity of profit experiences. It shows that a general poor level of profit experience masks the fact that some companies have done very well, despite price control, and others very badly.

Category II distributors

The report recalls that distributors' net profit margins had shown an apparent big recovery in the fourth quarter of 1975 to 71.0 per cent of reference levels. In the first quarter of 1976 profit margins fell to 47.1 per cent of reference levels.

The report comments just as the fourth quarter of the year is seasonally high for distributors, the first quarter is seasonally low. But even if this is taken into account the figure of 47.1 is still very low and compares with 56.6 per cent in the first quarter of 1975.

Nevertheless, some sectors, for example retail food and drink, have done quite well while others have done badly. Though the commission's figures are subject to revision as more returns come in the report says that there is no indication so far that the recovery in net profit margins now evident in manufacturing, has extended to distribution generally, although some sectors do now seem to be showing an improvement.

Section 3 of the report also describes the commission's work in administering the investment and profit safeguard provisions of the Price Code, and gives an analysis of notifications including pay settlements and a summary of the results of the special continuous review of prices of goods and services covered by the Price Check Scheme.

References to the commission

The report reviews the progress of the commission work under references made to it.

Under the fresh food reference the commission keeps fresh food prices under continuous review. During the three months to mid-May the commission's index of fresh food prices, rose by 11.2 per cent and was 31.6 per cent above the level of a year ago. In each case well over half of the in-

crease was accounted for by potatoes, reflecting both the marked increase in retail prices of potatoes and their weight in the index. Higher prices for meat were also a contributory factor.

The report goes on to describe the results of four monthly reports to the Secretary of State for Prices and Consumer Protection on the reference on the effect of the high level of potato prices on margins in distribution, and the Commission's work under other references.

Regional offices

Over 12,700 inquiries and complaints were received during the three months by the commission's 15 regional offices and the headquarters Information Centre, compared with over 13,300 during December to February and 14,100 during September to November. Almost three-quarters of those received are cleared on the day of receipt.

The inquiries received covered a very wide range; concern over the application of the productivity deduction to increases claimed under escalation clauses in contracts was very evident. There was also a large number of inquiries about the effect on prices of Budget changes. Inquiries about the Price Check Scheme are dealt with by DPCP and few were received by the regional offices.

Of the complaints received, almost half related to the cost of food and drink, notably potatoes and coffee, but also to ice-cream, cheese, and dried yeast. Non-food items which were the subject of numerous complaints included tobacco and cigarette prices, market stall rents, and, once again, the cost of servicing and maintenance of domestic electrical equipment.

Voluntary reductions in the price of 159 individual products were secured as a result of action by regional offices.

Statistical analyses of the commission's work are contained in appendices to the report.

Sir Harold Wilson to chair film industry action committee

Sir Harold Wilson is to chair a committee to carry forward progress made by the Terry Working Party on the British film industry. This announcement was made by Edmund Dell, Secretary of State for Trade on 22 July in reply to a parliamentary question from Mrs. Gwyneth Dunwoody (Crewe), who asked about plans he had to implement the recommendations of the Terry Report on the future of the British film industry. Mr. Dell said:

'As stated by the then Prime Minister on 29 March in reply to a question by My Hon. Friend, the Member for Leeds South East, although action is already being taken under existing legislation to release £2.37 million available for assistance through the NFFC, long term financial assistance and the establishment of a British Film Authority would both require fresh legislation. There is unlikely to be time in the next parliamentary session for a substantial measure of this kind but the Government intend to prepare a short financial bill to permit the creation of the basic working fund referred to by my Rt. Hon. Friend in his previous statement, for introduction as soon as parliamentary time permits.

'It had also been our intention to advance an initial sum of up to £5 million to the fund without delay once the necessary legislative approval had been given. I regret that in the light of the decision on public expenditure announced today by my Rt. Hon. Friend, the Chancellor of the Exchequer, it is now necessary to defer this step until 1978. The release of the £2.37 million through the NFFC will however be unaffected and will enable some further if limited measure of encouragement to be given to the industry and to the private sources of investment on which it is crucially dependent.

'In the meantime there is much that can be done and my Rt. Hon. Friend, the Member for Huyton, has accepted my invitation to chair an Interim Action Committee to carry forward progress made by the Terry Working Party. If he is to have a compact team to assist him, membership cannot be representational; but the committee will have a duty to consult widely with the industry in advising the Secretary of State, as will be seen from the following terms of reference.

"Having regard to the Government's announcement to Parliament on 29 March 1976, following the Report of the Prime Minister's Working Party on the future of the film industry, accepting the need to strengthen the industry's financial position and the case for a British Film Authority, and to its decision to set up a preparatory committee, the Committee (to be known as the Interim Action Committee) shall consult with the industry through its representative bodies and associations and advise the Secretary of State for Trade and other Ministers and public bodies as appropriate on the achievement of a viable and prosperous British film industry over the next decade." '

The proposed programme of work for the Interim Action Committee was spelled out in an exchange of letters between Mr. Dell and Sir Harold Wilson.

The Terry Report was published on 14 January. It made 39 recommendations which covered in particular the creation of a British Films Authority to carry out functions now performed by other statutory bodies and government departments, and the provision of additional funds for investment in the film industry.

Programme of work for Interim Action Committee

The programme of work for the Interim Action Committee on the film industry is set out in a letter sent on 22 July by Edmund Dell, to Sir Harold Wilson, the committee's chairman. Mr. Dell says:

'I am writing to confirm our recent discussions in which you indicated that you would be willing to chair a new Committee, to be termed the Interim Action Committee, to carry forward the progress made by the Terry Working Party; and, as you know, this was announced in my statement to the House today.

'The Terms of Reference for the Committee were contained in my statement, but I am repeating them below so that this will form a complete record of the position.

'Having regard to the Government's announcement to Parliament on 29 March 1976, following the Report of the Prime Minister's Working Party on the future of the film industry, accepting the need to strengthen the industry's financial position and the case for a British Film Authority, and to its decision to set up a preparatory committee, the Committee (to be known as the Interim Action Committee) shall consult with the industry through its representative bodies and associations and advise the Secretary of State for Trade and other Ministers and public bodies as appropriate on the achievement of a viable and prosperous British film industry over the next decade.'

'We also considered the programme of work for the Committee and agreed that, basically, it would fall into two categories:

on the one hand closer study of the appropriate constitution and operating role of a British Film Authority to assist in identifying the statutory requirements when legislation can be introduced; *on the other hand* to pick up at once subjects considered but not pursued to a conclusion by the Terry Group and identified by them as appropriate to the future work of a BFA – in particular:

i Closer co-operation between the cinematograph and television industries and in particular suitable arrangements for the provision of new finance for British feature film production by the BBC and ITV companies – see paras 59-81 of the Terry Report.

ii The means of promoting overseas sales of British films and production facilities, including the services of the Export Credits Guarantee Department (see paras 55, 109-110 of the Terry Report).

iii The improvement of statistical information, particularly about investment in British film production and overseas earnings (see paras 82-83 of the Report).

iv Appropriate action to supply developing technologies in video and other equipment in consultation with manufacturers and distributors.

v Scope for further improvements in the distribution and exhibition of films in the United Kingdom.

'You made it clear to me that you would not wish to receive any payment of salary or expenses in respect of your chairmanship of the Interim Action Committee.

'I hope to be in a position to announce the other members of the Committee shortly.

'I am sure that the Committee will make a most valuable contribution to the health of the film industry and I wish it success in its future work.'

Relaxation of hire purchase controls

Hire purchase controls on three-wheeled passenger motor vehicles (ie mechanically propelled three-wheeled road vehicles not being vehicles constructed or adapted for the purpose of carrying goods) will be abolished by an Order* laid before Parliament on 23 July by the Department of Prices and Consumer Protection. The Order also consolidates into a single Order the Hire Purchase and Credit Sale Agreements (Control) Order 1973 and subsequent amending Orders and it provides for standard motor cars purchased by persons in receipt of mobility allowances in Northern Ireland to be exempt from hire purchase controls in the same way as those purchased by persons in receipt of such allowances in Great Britain. The Order comes into force on 23 July 1976.

Copies of the Order will be obtainable from HM Stationery Office, 49 High Holborn, London WC1 and branches, or by post from HM Stationery Office, PO Box 569, London SE1.

The Hire Purchase and Credit Sale Agreements (Control) Order 1973 as amended (SI 1973 No. 2129 amended by SI 1974 No. 1868, 1975 No. 711, 1975 No. 2139 and 1976 No. 544) was introduced in December 1973.

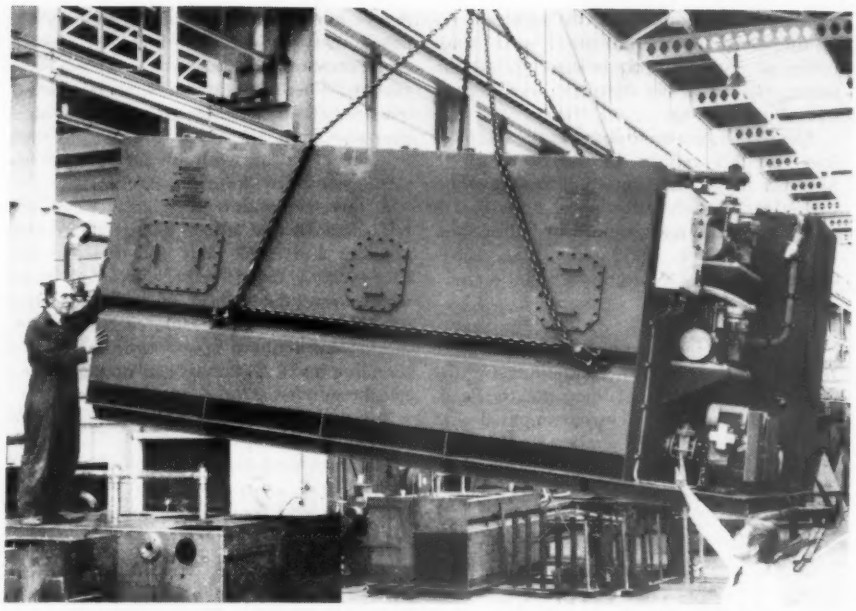
Minimum deposit to be paid in advance

The hire purchase controls require a specified minimum deposit to be paid in advance and the balance to be paid over a specified period in all hire purchase contracts and credit sale agreements for certain goods.

Under the controls three-wheeled motor vehicles have been subject to a minimum deposit of 33⅓ per cent and the period for payment of the balance was 24 months. The present change removes the controls on three-wheeled motor vehicles not being vehicles constructed or adapted primarily for the purpose of carrying goods from the Order so that the amount of the deposit and the period for payment of the balance in hire purchase and credit sale transactions will no longer be controlled. The decision to make this change was taken in the context of the Government's industrial strategy.

Trade inquiries relating to the Hire Purchase and Credit Sale Agreements (Control) Order 1976 should be directed to the Department of Prices and Consumer Protection, Prices Policy and Consumer Credit Division, 1 Victoria Street, London SW1, tel. 01-215 3738.

* The Hire Purchase and Credit Sale Agreements (Control) Order 1976 (SI No. 1976/1135).



Hamworthy Engineering Ltd., a member of the Powell Duffryn Group, has just built and delivered four of its Trident marine sewage treatment units and one of its new Neptune marine incinerators within 50 days of receiving the initial order. The contract was worth £65,000. The equipment, ordered from Hamworthy's Pump and Compressor Division, was wanted in a hurry for installation aboard the 19,000-tonne Panamanian liner, *Al Hasa* – formerly the *Principe Perfeito* of Portugal – undergoing a refit at Swan Hunter's shipyard on the Tyne. The liner, recently bought by the Global Transportation Organisation of San Francisco, will be used as a floating hostel for 600 stevedores. Picture shows one of the marine sewage treatment units being prepared for despatch.

Patents endorsed 'Licences of Right'

Under Section 35 of the Patents Act 1949 the following patents were endorsed 'Licences of Right' on the date(s) specified.

Number	Grantee	Subject-matter
22 June 1976		
1,377,610	Laboratoires Jacques Logeais	Improvements in or relating to 5-(piperidine -4-spiro)-oxazolidinones, method for their preparation and applications thereof
1,313,667	Licentia Patent-Verwaltung-Gesellschaft mit beschranker Haftung	Improvements in or relating to scanning circuit arrangements
1,317,020	Licentia Patent-Verwaltung-Gesellschaft mit beschranker Haftung	Improvements in or relating to scanning circuit arrangements
1,141,371	Cyril Douglas Lister	Improvements in or relating to spray lubricating devices
1,172,594	John H. Shea	Writing instrument with convertible cartirdge
1,269,828	Henry Folhe Swenson	Wheel dressers
1,271,593	International Standard Electric Corporation	Automatic telecommunication system
1,304,697	Societe d'Exploitation des Laboratories Bottu	Compositions containing a plasma protein
1,327,085	Nippon Victor Kabuchiki Kaisha	Electron scattering prevention film
1,327,859	Michele Bassino and Vittorio Bassino trading as Saldomatic di Michele Voltorio Bassino	A consumable electrode wire contact tube-displacement and consumable electrode wire feed device for automatic arc welding machines
23 June 1976		
1,353,710	Hitachi Ltd.	Plane multi-digit type electric discharge display devices
1,375,626	Hitachi Ltd.	Colour picture tubes
1,388,091	Hitachi Ltd	Colour picture tubes
1,388,231	Hitachi Ltd.	Colour picture tubes
1,389,096	Hitachi Ltd.	Correcting lenses utilised in the manufacture of fluorescent screen of colour picture tubes and method of manufacturing the same
1,392,108	Hitachi Ltd.	Post-deflection focussing type colour picture tubes
1,392,480	Hitachi Ltd.	Post-deflection focussing type colour picture tubes
1,403,936	Hitachi Ltd.	Electron guns for use in cathode ray tubes
1,407,608	Hitachi Ltd.	Colour picture tubes
1,422,838	Hitachi Ltd.	Exposure apparatus for manufacturing fluorescent screens of colour picture tubes
1,126,435	Standard Telephones and Cables Ltd.	Improvements in or relating to oscillators
1,131,928	Standard Telephones and Cables Ltd.	Electromechanical relays
1,219,918	Standard Telephones and Cables Ltd.	Improvements in and relating to moving coil transducers
1,232,540	Standard Telephones and Cables Ltd.	Improvements in or relating to telephone exchanges
1,353,310	Standard Telephones and Cables Ltd.	Semiconductor device mounting arrangement
1,388,165	Standard Telephones and Cables Ltd.	M.T.I. radar
1,393,686	Standard Telephones and Cables Ltd.	Tap changing arrangements for mains transformers
1,147,414	International Standard Electric Corporation	Path hunting circuit in a telephone network with centralised control unit
1,180,369	International Standard Electric Corporation	Translator arrangement
1,229,183	International Standard Electric Corporation	Improvements to data processing systems
1,343,383	ITT Greed Ltd.	Isolation circuits for telegraphic devices.
1,344,794	ITT Greed Ltd.	Isolation equipment for telegraphic apparatus
1,071,684	Societe Anonyme Automobiles Citroen	Improvements to self-braking hydraulic transmissions for motor.

Number	Grantee	Subject-matter
1,108,818	Societe Anonyme Automobiles Citreon	Improvements in or relating to regulating devices of barrel-type hydraulic transmission systems
1,187,768	Coal Industry (Patents) Ltd.	Mining machine
1,273,534	John Spurway Wood and Clifford Spurway: Trading as 'Spurwood Development Company'.	Improvements relating to power driven abrading machines
1,400,768	Hans Viessmann	Boiler
2 July 1976		
1,393,362	EMI Ltd.	Improvements in or relating to band pass filters
1,399,835	EMI Ltd.	Improvements relating to recording
1,388,846	Geoffrey Milson, John Williams	Improvements in or relating to the manufacture of concrete structures
1,389,538	Geoffrey Milson, John Williams	Improvements in or relating to building walls
1,126,637	R. B. Jenkins and Co. Inc.	Pneumatic cleaning means for carding machines
1,296,783	John Vernon Buckland	Improvements relating to the removal of pollution from the surface of salt and fresh water
1,308,151	Cyril Douglas Lister	Forward view device for a motor vehicle
1,343,754	The Coca-Cola Co.	Method of drying
1,362,564	John Houghton	Improvements in or relating to joist brackets for buildings
1,402,685	SA Automobiles Citroen	Improvements in or relating to vehicle braking systems
9 July 1976		
1,326,339	Societa Italiana Resine S.I.R. SpA	Process for preparing epoxide resins
1,338,186	Societa Italiana Resine S.I.R. SpA	Poromeric materials
1,342,699	Societa Italiana Resine S.I.R. SpA	Process for preparing aluminium trichloride
1,363,580	Societa Italiana Resine S.I.R. SpA	Unsaturated polyester resin compositions
1,324,462	Cockerill-Ougree-Providence et Esperance-Longdoz, en Abrege 'Cockerill'	Treating steel sheet
1,325,783	Cockerill-Ougree-Providence et Esperance-Longdoz, en Abrege 'Cockerill'	Manufacture of welding wire
1 083,861	Ibis Engineers Ltd.	Improvements in pressing machines used in the laundry or dry cleaning and clothing industries
1,351,333	Ibis Engineers Ltd.	Improvements in snubbing devices or shock absorbers
1,356,032	EMI Ltd.	Improvements in or relating to data retrieval
1,396,874	EMI Ltd.	Improvements in or relating to magnetic alarm arrangements
1,290,098	PHI Magnetronics Ltd.	Improvements relating to magnetic tape recording playback heads
1,298,668	Albert Rolland SA (formerly Les Laboratoires Albert Rolland)	Process for obtaining and preserving stable bacterial variants
1,299,656	Jules Louis Jeanneret	Improvements in or relating to machine tools
1,310,932	Werner Frach	Improvements in or relating to control devices for operating windows
1,344,151	R. W. Whittle Ltd.	Improvements in gymnastic climbing frames and other exercising apparatus
1,345,742	John Coggin and Darrell Stafford Jackson	Improvements in apparatus for introducing preservatives liquids into grain
1,384,074	Greenwood Airvac Ventilation Ltd.	A reinforced louvred construction
1,423,902	Saul Fox	Improvements in or relating to garment hanger devices
1,425,644	Townson and Coxson (Midlands) Ltd.	A tubular valve housing having an outwardly-extending flange engageable by an inwardly-flanged internally screw-threaded connecting ring
14 July 1976		
967,285	Halspen Engineering Ltd.	Improved glove turning machine
1,145,469	Standard Telephones and Cables Ltd.	Cooler for travelling wave tube
1,172,483	Standard Telephones and Cables Ltd.	Improvements in electric cables
1,330,717	Standard Telephones and Cables Ltd.	Radio navigation system
1,335,899	Standard Telephones and Cables Ltd.	Radio navigation beacon
1,360,338	Standard Telephones and Cables Ltd.	Improvements in electrical waveguide arrangements
1,363,519	Standard Telephones and Cables Ltd.	Acoustic surface wave device
1,399,726	Standard Telephones and Cables Ltd.	Water containing plant growth medium
1,406,663	Standard Telephones and Cables Ltd.	Improvements in or relating to telephone subset circuits
1,234,941	EMI Ltd.	Improvements in or relating to pattern recognition devices
1,357,340	EMI Ltd.	A prism assembly
1,337,353	Nippon Zoki Pharmaceutical Col Ltd.	Butylene glycol ether derivative
1,337,630	Nippon Zoki Pharmaceutical Co. Ltd.	Butylene glycol ether derivative
1,426,010	Glaverbel-Mecaniver	Impact besistant panels
1,426,906	Glaverbel-Mecaniver	Edge protection of vitreous panels
1,325,202	Vendops Ltd.	Improvements in cup magazines for beverage vending machines
1,337,392	Vendops Ltd.	Improvements in or relating to beverage vending machines
1,357,757	Vendops Ltd.	Improvements in cup magazines for beverage vending machines
1,359,832	Coal Industry (Patents) Ltd.	Underframes for mineral mining machines
1,366,407	Peabody Galion Corporation	A rear loading refuse vehicle
1,401,336	Nippon Victor Kabushiki Kaisha	Expander circuit for a compression and expansion system

Any person who claims that the patentee at the time of endorsement of any of the above patents was precluded by a contract in which claimant is interested from granting licences under the patents may apply for cancellation of the endorsement on Patents Form No. 45 within two months after the date of endorsement.

E. Armitage
Comptroller

Proceedings under Section 36 of the Patents Act, 1949

Notice is hereby given that the endorsement 'Licences of Right' under the undermentioned Patent was cancelled on:

Number	Grantee	Subject-matter
9 July 1976		
1,002,356	Kleinwefers Industrie – Co. GmbH	A method of and apparatus for producing thermoplastic sheet

Sir Alexander Glen (left), chairman of the British Tourist Authority, welcomes new member Ednyfed Hudson Davies to the BTA board's July meeting. As new chairman of the Wales Tourist Board, Mr. Hudson Davies is also a member of the Authority's board.

New chairman of London Tourist Board

Lord Ponsonby, this year's chairman of the Greater London Council, will be the chairman of the London Tourist Board for a period of three years from 1 October 1976. His appointment was announced jointly on 21 July by the English Tourist Board and the Greater London Council.

He will succeed Sir Anthony Milward, chairman of LTB since 1971, who has been appointed president of LTB, in succession to the Very Reverend Martin Sullivan, Dean of St. Paul's.

Concorde prototype goes on display

Concorde 002, the British-assembled prototype, has begun its new role as a public exhibit, following a presentation ceremony at RNAS Yeovilton on 26 July.

Gerald Kaufman, Minister of State, Department of Industry presented the aircraft to Lord Donaldson, Minister for the Arts, when it moved to its permanent exhibition site adjacent to the Fleet Air Arm Museum, where it will be held on behalf of the Science Museum.

Between spring 1969 and autumn 1974 Concorde 002 undertook over 800 hours of development flying.

Fee increase for marine and fishing vessel surveys

Revised fees for many of the surveys carried out on ships and their equipment come into force on 4 August 1976. The surveys are carried out under the Merchant Shipping Acts and International Conventions.

The increase in the marine survey fees is a result of a review carried out by the Department of Trade in 1975/76, and was forecast at the time of the last increase in March 1976. The fishing vessel survey fees have not been increased since they were introduced in 1975. It is Government policy to recover the full costs of fee-earning marine and fishing vessel surveys.

The regulations are the 'Merchant Shipping (Fees) (No. 2) Regulations 1976. SI 1976/1098 HMSO. They replace the Merchant Shipping (Fees) Regulations 1976 SI 1976/346. A revised edition of the Department of Trade publication 'Fees for Marine Surveys and other marine services' is being prepared and when published will be available from HMSO.

Onshore petroleum exploration licences

Tony Benn, Secretary of State for Energy, has granted 16 onshore licences authorising the exploration for petroleum (oil and gas) under the provisions of the Petroleum (Production) Act 1934 and related regulations.

The licences authorise the searching for oil and gas by prospecting and geological survey, including drilling to a depth of not more than 350m to obtain geological information.

Changes to fifth round offshore licensing arrangements

Two adjustments to the detailed arrangements for the forthcoming fifth round of offshore licensing were announced in Parliament on 20 July by Tony Benn, Secretary of State for Energy.

His announcement was contained in an answer to a parliamentary question from Dennis Canavan (Stirlingshire, West) who had earlier asked the Secretary of State whether he would make a statement about the consultation he has had about the next round of offshore oil drilling licences.

Mr. Benn gave the following further information:

'I have completed consultations with the industry and with the trade unions on the proposals in the consultative document on the fifth round of offshore licensing. Consequent upon these consultations and the consideration of other views I have received, I have concluded that the arrangements for the round should be as proposed in the consultative document, with two adjustments as follows.

'First, I am making adjustments in the detailed arrangements for relinquishing and retaining licensed territory, so as to afford the licensees some greater flexibility whilst preserving the intended incentives to engage expeditiously in exploration.

'Secondly, both the British National Oil Corporation and the United Kingdom Offshore Operators Association have emphasised the importance of basing the negotiations for an operating agreement between the Corporation and its prospective licence partners on an agreed standard document. I recognise the value of this and I have therefore asked the Corporation and the Association to work together on the preparation of such a standard document following generally the line set out in Appendix 1 of the consultative document. The standard text which the two parties propose will be subject to my approval, and I will need to be satisfied about any particular agreement eventually settled between the Corporation and individual applicants, before I issue a licence.

'I hope soon to lay revised regulations on licensing arrangements, and to make the formal invitation of applications when the regulations are in force.'

This giant cable drum is one of 10, designed and made by Warrington Wheel Co. Ltd. for a hydro-electric scheme in Wales, which are claimed to be larger than any yet built. Each drum measures 5.3m in diameter and will hold 50 tonnes of 152.4mm thick high tension cable. The company has specialised in outsize cable drums for many years and is a world leader in the technology. Future plans include a new contract for drums to carry 100 tonnes of cable. Designs for the manufacture of even bigger drums to hold 200 tonnes of cable are now on the drawing board.

Clearance of merger proposal

Shirley Williams, Secretary of State for Prices and Consumer Protection has decided, on the information at present before her, not to refer the following proposed merger to the Monopolies and Mergers Commission under the provisions of the Fair Trading Act 1973:

Lonrho Ltd. and Brentford Nylons Ltd.

The china and tableware interests of Royal Worcester Ltd., and The Carborundum Company;

Dentsply International Inc./A D International Ltd.

Costs escalation of North Sea development falling says report

North Sea development costs, in many cases, more than doubled between 1973 and 1975, but the lessons learned in that period are already leading to much lower escalation rates. This is the main conclusion of a study* on North Sea costs escalation, publication of which was announced in a written parliamentary answer on 21 June by Dr. Dickson Mabon, Minister of State for Energy.

Dr. Mabon, answering Mr. J. M. Craigen (Glasgow, Maryhill) who asked for a report on the progress of the Study Group on North Sea Cost Escalation set up in June 1975, said 'The report of the study group is being published this afternoon and copies will be available in the Library of the House.

'The report is in two parts, the first by the study group and the second by the consultants Peat, Marwick, Mitchell and Co. and Atkins Planning. A summary of the conclusions and recommendations is at the end of Part I. The report contains a good deal of material on the experience of companies during the early years of the development of North Sea oil. I believe that this will be valuable to those in the industry and elsewhere concerned with this important subject.

'The report shows that in the period 1973 to 1975 estimates of costs in many cases more than doubled. The most important cause was an initial underestimation by the oil companies of the magnitude of the technological challenge presented by the North Sea combined with the telescoped timescale in which the work was to be completed. In addition to this there was the level of general inflation prevailing at the time. The various contributory factors are analysed in detail in Part II.

'The study confirms the Government's impression that the combination of circumstances in 1973 to 1975 was exceptional and that for the future, unforeseen cost escalation is unlikely to be such a severe problem. Lessons learnt from the early years, greater knowledge of the technical and physical conditions, a more deliberate timescale and reduced pressure on resources should all help to limit levels of cost escalation. The available evidence suggests that escalation rates this year are well below the levels of 1973 to 1975. The Government will continue to monitor the situation closely.

'The report recommends improvements in project management and quality control on the part of the operators. The department will be discussing with the operators ways in which the suggestions of the study group can be pursued. The recommendations also include proposals on research and development, certification of offshore structures and collection of meteorological data. In all these areas there have been important developments through the work of the Offshore Energy Technology Board, the Certifying Authorities and the Meteorological Office, and my department is working on further measures within the limits of the funds available.'

* North Sea Costs Escalation Study. Energy Paper No. 7. HMSO. Available from Government bookshops. Price £3.35 net.

Government Sales

Ministry of Defence

11 August 1976 Miscellaneous stores

Location: Auctioneer's premises

Auctioneers: Woolland Son & Manico (Dept. L), Kinterbury House, St. Andrew's Cross, Plymouth PL1 2DQ (tel: 0752 69292)

Stores lying at various depots in the West country including greatcoats, raincoats, blankets, footwear, tentage and other clothing and textiles. A large quantity of chairs, tables, wardrobes and other furniture. Vehicles and machine tools including Bedford coaches, foam water tankers, Landrover, Ford glider winch truck, AEC Matador, Austin and Morris vans and a David Brown tractor. Denham lathe, Herbert pedestal drilling machine and many other miscellaneous items.

17 August 1976 Miscellaneous stores

Location: Ordnance Storage & Disposal Depot RAOC, Ruddington, Notts.

Auctioneers: Arnold & Son (Dept. L), 13 Market Place, Burton-upon-Trent, Staffs, DE14 1HD. (tel: 0283 64657)

A large quantity of stores which include household furniture, MT, electrical and electronic spares and equipment, aircraft components and ground equipment. Various textiles, zips, scrap metals, wooden and metal boxes, vehicle tyres, engineering tools and equipment, binoculars, watches, cameras and other photographic materials, 3 Alvis fire trucks and other vehicles.

Catalogues for the above sales which give details of the lots, conditions of sale, viewing times, etc., are available from the auctioneers from two weeks before and up to the day of the sale, price 20p, postage and packing 10p extra (postal orders only).

Wembley Auction Sales 1975/76

3 August 1976

View Days:	Day preceding and morning of sale
Location:	Department of the Environment Property Services Agency Supplies Division Store India Pavilion Exhibition Grounds Wembley, Middx. Tel. 01-903 2508
Description of Goods:	Office and Miscellaneous Furniture Engineering, Electrical, Canteen, Domestic and Other Equipment
Auctioneers:	Messrs. Fuller, Horsey, Sons and Cassell 52 Bow Lane London EC4M 9ET Tel. 01-248 7954
Catalogue:	Direct from the auctioneer price 10p each

ENCIRCLE TI 155 ON PAGE 358 FOR FURTHER INFORMATION

Technology news

Seabed engineering: NRDC support no longer needed

The National Research Development Corporation announced last week the sale of their 26 per cent shareholding in Vickers Oceanics Ltd. to Vickers Ltd. 'We are selling our shares now' said Bill Makinson, managing director of NRDC, 'because the technology is well established and the company is prospering. We have thus fulfilled our purpose to support a high-risk, speculative, innovative project through its development phases and have withdrawn now that our particular job is done.'

Agreement has been reached with Vickers Ltd. for the sale to Vickers of the shares owned by NRDC for a total price of £1.625 million, thus realising a profit for the Corporation of £1.375 million. In addition to this equity holding, NRDC made available, during the project, loans and guarantees totalling over £3 million.

Capital for Britain's entry into this expanding field, then dominated by foreign interests, was subscribed by NRDC, Vickers Ltd. and James Fisher and Sons Ltd. As a result, ocean technology originating in the United States and Canada was developed in the UK, and Vickers Oceanics rapidly gained recognition as the world leader in its field of specialised engineering.

Vickers Oceanics division began operations with a small converted trawler and one Pisces submarine in 1968–9. In 1972 Vickers Oceanics Ltd. was formed and at the end of its first year, with two ships and three submarines, it had achieved a turnover of £500,000. The company now operates a fleet of five ships and eight submarines, including a Perry submersible with diver lockout system.

Vickers Oceanics is also joint owner with Fred Olsen, the Norwegian shipowners, of Fred Olsen Oceanics, operating one mothership and submersible with an additional lockout submersible being delivered to the company at the end of the year.

Also included in the research programme of Vickers Oceanics is development of equipment for launching and retrieving mini submarines, re-development of tools for specialised underwater work, and the modification of existing submersible craft to suit them for particular projects. A one-atmosphere transfer system for men and materials, using equipment already in commercial service, has also recently been designed.

Repairs in deep waters

A newly-developed unmanned submersible craft called Scarab (Submerged Craft Assisting Recovery and Burial) will be delivered this year for use in the recovery, repair and relaying of coaxial submarine telephone cables buried under the sea floor and other maintenance work on shallow water cable.

Scarab is being built in California by Ametek Straza Inc.

Finance for Scarab's development and construction, which will total about £2,000,000, is being provided by a consortium comprising the American Telephone and Telegraph Corporation, Cable and Wireless Ltd. (who will also operate Scarab), the British Post Office, the French Ministry of Posts and Telecommunications and Teleglobe, the Canadian Telecommunications Corporation.

It has been designed basically to operate in depths down to 1,000 fathoms, where it is required to un-bury a defective cable sometimes from 4 ft. below the sea bed, and then re-bury after the cableship has completed the repair.

To enable it to carry out this work the remotely controlled tethered vehicle has a variety of sensors including magnetometers and gradiometers. These devices, specially developed at the Bell Telephone Research Laboratories, locate buried cables and repeaters. The vehicle has a complex computer controlled locator system so that the mother ship and pilot have continuous visual display of the vehicle's relative position together with complete TV display of the work being undertaken on the sea bed.

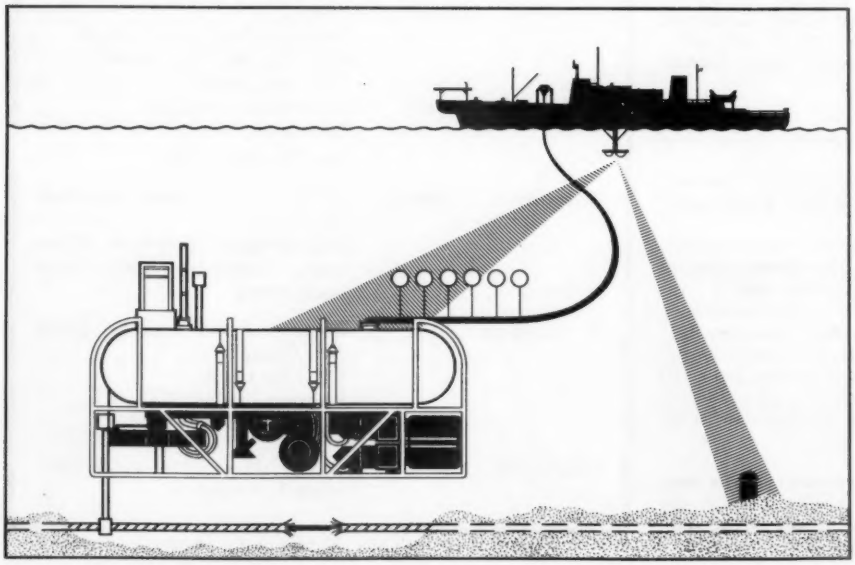
When burying or pulling up cable, Scarab uses a water jet which emulsifies the sea bed. In this way the cable will sink under its own weight, or be seized by Scarab's gripper as it lies exposed.

In addition to repair work it is likely that Scarab will find significant applications in the examination and burying of existing cables already on the sea bed.

'With fishing fleets operating in deeper and deeper waters,' said Mr. Pitt, of Cable and Wireless, 'the damage to cables from trawlers is a growing problem, and the importance of this area of the vehicle's activity could prove considerable.'

Another factor, and one which is likely to save costs is Scarab's ability to bury lightweight, unarmoured cable.

Scarab, the robot submersible being built in California. The British Post Office is one of the members of the consortium contributing to the cost.



Three years research into geothermal energy

The Department of Energy is to implement a three-year programme of research into developing geothermal energy in the United Kingdom, Alex Eadie, Parliamentary Under-Secretary of State, at the Department of Energy, said last week.

Mr. Eadie was answering a parliamentary question from Ian Campbell (West Dunbartonshire) who asked the Secretary of State for Energy what progress his department was making in this field.

In a written reply, Mr. Eadie said the Department of Energy's Energy Technology Support Unit had looked into various alternative forms of energy including geothermal energy and a report entitled 'Geothermal Energy: the Case for Research in the United Kingdom', had been published last week.

'After consideration of this report,' he said, 'the Advisory Council on Research and Development for Fuel and Power has recommended a three-year programme of geological and related studies which it is now the department's intention to implement. The total cost of this is estimated to be £840,000.

'Partial funding has been applied for from the European Commission as part of the EEC's geothermal research and development programme.'

Battery electric bus project final report

Battery electric buses are likely to be more expensive to run, using conventional lead/acid batteries, than broadly equivalent diesel vehicles. But given improvements which may be feasible in a few years time with more advanced battery technology, much better range and performance might be achieved which could radically alter the market prospects.

These are among the conclusions of the final report now published on the operational trials of the two Department of Industry battery electric buses.

Between March 1972 and October 1974, the electric buses were placed with 12 operators in 14 towns and cities. Using conventional batteries as existing in 1970, the vehicles were able to meet the demands of nine of the 14 routes on which they were used.

In the case where it was possible to make a fairly direct comparison with a conventional diesel vehicle, fuel consumption of the battery electric bus was notably higher. In spite of the lower energy cost of electricity, small electric buses of the type under test will usually show higher overall operating costs because, unlike the diesel bus, they are not favoured with the fuel duty grant. While the quietness and lack of emission of the vehicles were appreciated, operators were not usually prepared to pay a premium for these qualities.

Copies of the report 'Battery Electric Bus Project: Final Report' by D. A. Saunders, can be obtained from Mr. G. W. Wicken, Vehicles Division, Department of Industry, Room 729, Abell House, John Islip Street, London SW1P 4LN (tel. 01-211 5703).

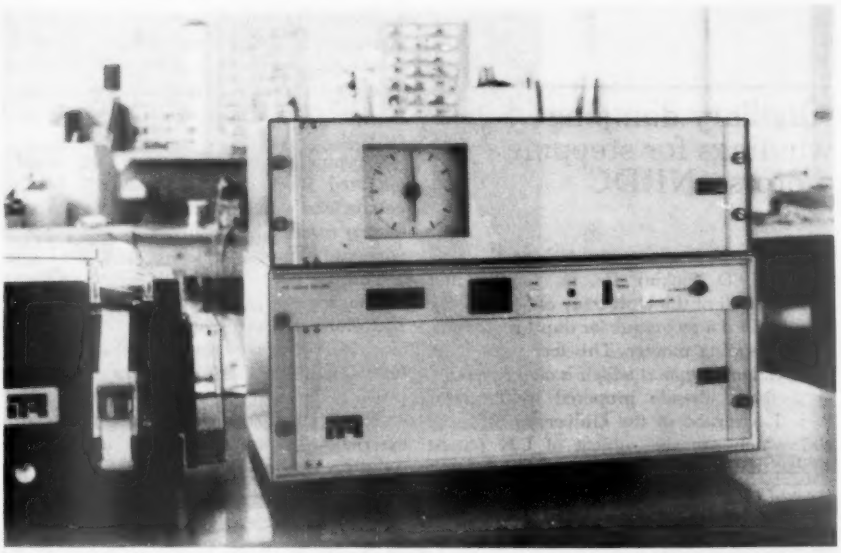
New chairman for Engineering Materials Requirements Board

Dr. Anthony Kelly, Vice-Chancellor of the University of Surrey, has been appointed by the Department of Industry as next chairman of its Engineering Materials Requirements Board (EMRB). He will take up his appointment on 1 October 1976.

He succeeds Mr. Rupert Crane, a director of Imperial Metal Industries who has completed his term of office as first chairman. Mr. Crane became chairman in December 1972 when the board was set up.

Dr. Kelly was Director of Studies at Churchill College Cambridge from 1960 to 1967 when he was appointed Superintendent of the Division of Inorganic and Metallic Structure at the National Physical Laboratory. Two years later he became Deputy Director in charge of the Laboratory's Materials Group. He was elected a Fellow of the Royal Society in 1973 and he spent a period of secondment at Imperial Chemical Industries Ltd. from February 1974 to June 1975. He took office as Vice-Chancellor of the University of Surrey on 1 October 1975.

Time recorder cuts costs



This time recording equipment, shown for the first time in London on Wednesday, 14 July, cuts wages department costs and improves production efficiency, it is claimed. Developed by International Time Recording Co. Ltd., it collects information from conventional time recorders and processes it immediately into computer-acceptable form. Employees still have their own printed time card record but the time taken to collect cards and calculate wages individually has been eliminated. The system can also be used to to supply information on absenteeism within minutes of the start of a shift so allowing for quick re-scheduling of production lines. Known as the ITR Konros, the system will be on the market this year. Pictured above is the quartz crystal clock and data processing unit through which information is processed.

EMRB aims to support appropriate Research and Development in engineering materials to improve the technological and commercial competitiveness of British industry. It also wishes to improve quality of working and environmental conditions, and it hopes to provide information for statutory/regulatory purposes, also for standards and specifications.

The board's interests cover a wide range of ferrous, non-ferrous, organic, inorganic and composite materials and their processing in engineering and domestic use.

Surveying earth's resources from space

On Thursday, 22 July, at Reading University, the Chief Scientist of the Department of Industry, Sir Ieuan Maddock, officially opened the first United Nations training seminar in 'Remote Sensing' to be held in the United Kingdom.

This seminar is the sixth in a series planned by the United Nations expert on space applications in different regions of the world, to help developing countries benefit from one of the recent advances in space technology, 'Remote Sensing'.

Remote sensing involves the detection by sensors in spacecraft, rockets, or aircraft of reflected or emitted radiation from the earth's surface and the subsequent analysis of these signals.

Different surfaces with varying properties reflect and emit differing amounts of radiation. The study of these differences enables the scientist to increase the information available on the natural resources of countries where existing knowledge is insufficient, eg in fields as diverse as crop reporting, forest management, soil surveys, urban planning, water resources, geological and minerals resources.

Twenty-five specialists from 22 countries in Latin America, Africa, the Middle and Far East are being trained over a period of three weeks. Their programme includes practical work as well as theory, with test areas around Reading and near Sheffield having been chosen for study. Data from the Landsat satellite have been obtained and aircraft have flown over the areas with various types of UK sensor aboard (cameras, infrared linescan and radar). Imagery has been obtained using different types of film, and ground measurements have been made to implement the data.

Trainees will be taught to interpret these data using UK equipment and to compare their results with ground measurement taken by themselves. Data typical of their own countries will also be examined.

Much of the training is by the staff of Reading University geography department with the assistance from experts from other universities, UK government and industry. Visits to UK organisations and firms will illustrate particular applications of remote sensing techniques and there will be two exhibition evenings sponsored by industry. In a final lecture period invited speakers from USA, Canada, Europe, including UK, will talk about their own projects so that participants may evaluate work taking place elsewhere in the world. These sessions will be open to invited members of the UK remote sensing community.

Technology News

Continued

Auxiliary damping windings for stepping motors – NRDC

Dr. I. E. D. Pickup, Dr. D. Tipping and A. P. Russell of the University of Manchester have devised a technique for improved damping of stepping motors. This technique is an independent proposal which is closely related to methods already proposed by Professor P. J. Lawrenson of the University of Leeds and which are the subject of UK patent applications. The Manchester technique uses auxiliary windings which can be accommodated within many existing commercial motors without any increase in frame size.

As stepping motors have become more widely used, for instance in line printers and recording instruments, the ability of the motor to settle rapidly at the end of each step has increased in importance.

It has been widely recognised for some time that both the mode of excitation and the value of stator resistance per phase are important factors in determining the level of damping for a particular motor. On the optimum damping criterion the series resistance per phase is a few ohms, the value used for a given excitation sequence depending on the total moment of inertia of the rotor plus load. The direct voltage supply is set accordingly to drive the correct level of steady-state current.

Stepping motors, however, are usually operated with significantly larger applied voltage and series resistance. There is, therefore, a conflict between the requirements of adequate damping and rapid response.

The use of stator auxiliary coils to damp the single-step response applies to both single- and multistack stepping motors. Each phase of a motor is provided with a bifilar winding. One coil of the bifilar pair on each phase provides the excitation, while the other is used as a closely coupled auxiliary coil terminated externally by an appropriate impedance – usually a resistor.

Great flexibility is achieved simply by having control of the terminating impedances of the auxiliary coils, and erratic behaviour in the regions of low-frequency resonances can be avoided.

Companies interested in the use of auxiliary damping windings in stepping motors are asked to contact Peter Thompson, Electrical Engineering and Electronics Group, NRDC, to discuss licensing arrangements.

Part of Tyne and Wear County Council's experimental plant at Byker, near Newcastle for processing domestic refuse – the pelletising machine which uses up the paper and plastic residue for producing a waste derived fuel.

Fabric tube keeps up the water level

A portable fabric tube dam – a sausage of water 70 ft. long and 4 ft. high – has been laid across the River Avon to help to maintain water supplies to Bournemouth residents. The dam acts as a weir to hold up the local river level at The Bournemouth and District Water Company's pumping station at Matchams, near Ringwood, and has been designed and installed by John Hudson (Birmingham) Ltd. under licence from the National Research Development Corporation.

The abnormally dry weather of the past 13 months has reduced the average level of water in the Avon by some 18 in. – creating pump suction difficulties at the pumping station, and the tube dam has now raised the river level at the abstraction intake by about 12 in.

The bag that forms the dam is made of a woven polyester fibre coated with pvc and, when filled with water, its cross-section takes up the shape of a tear-drop owing to the pressure of the water above the dam. A large flat sheet of fabric is fitted on the upstream side of the dam, and the pressure of the water above this sheet anchors the dam in position on the river bed and prevents water flowing under it.

Helping Iran with nuclear safety

The UKAEA has signed a co-operation agreement with the Atomic Energy Organisation of Iran (AEOI) to provide consultancy services and assistance in the field of nuclear safety. This is the third of a series of agreements recently concluded between the Authority and the AEOI in support of Iran's rapidly growing nuclear power programme: other contracts already in operation cover the training of Iranian staff at Harwell and universities in the UK, and consultancy work in the setting up of a nuclear research centre at Tehran.

The present agreement provides for safety assessments of nuclear power installations, for the training of specialist safety staff in the UK, and for assistance with the setting up of a nuclear safety organisation in Iran. It will run for an initial period of two years, and will be implemented by the Safety and Reliability Directorate at Culcheth, project officer R. O'Neil, head of reactor engineering branch.

The programme is expected to involve other parts of the UKAEA, including Harwell's Environmental and Medical Sciences Division. Other organisations such as the National Radiological Protection Board, the Nuclear Installations Inspectorate of the Health and Safety Executive, the Ministry of Agriculture, Fisheries and Food and the CEGB will be involved.

You are invited to apply for The Queen's Awards

The Queen's Awards for Export and Technology are given to those firms which show, irrespective of their size, the most outstanding achievements in increasing exports or in technological advancement.

To be eligible for the Awards, applicants must be UK-based producers of goods or providers of services.

If you would like your company to be considered, please fill in your name and address below and send this to The Secretary, The Queen's Awards Office, Williams National House, 11/13 Holborn Viaduct, London EC1A 1EL, Telephone no. 01-222 2277.

Application forms giving full details about eligibility will then be sent to you.

Please indicate whether your application will be in respect of exports or technology or both.

Name _____ Name of Company _____

Address _____ TI1

_____ Exports/Technology/Both. Delete where appropriate.

The closing date for return of applications is 31 October, 1976.

ENCIRCLE TI 151A ON PAGE 358 FOR FURTHER INFORMATION

Parliament

Monday, 19 July

Chrysler (UK) Ltd.

Mr. Peter Viggers (Gosport) asked the Secretary of State for Trade to institute an inquiry into the affairs of Chrysler (United Kingdom) Ltd. under Section 165(b) of the Companies Act 1948: 'On the lines that the directors failed to provide shareholders of the company, including Her Majesty's Government, with sufficient information during the period leading up to their approach to Her Majesty's Government for financial facilities'.

'No,' said Mr. Clinton Davis. 'During the period in question shares in Chrysler (UK) Ltd. were held exclusively by the parent company, and by directors.'

Court Line Ltd.

Mr. Terry Walker (Kingswood) asked if the creditors of Court Line Ltd. had been kept fully informed of the financial position since the company went into liquidation.

Mr. Clinton Davis answered: 'A summary of the Statement of Affairs, submitted in the liquidation of Court Line Ltd. by a director and the secretary of the company and showing the estimated assests and liabilities, was issued to creditors and contributories by the Official Receiver, together with his observations, on 23 April 1976.

'On or about the same date the joint liquidators of the company issued a press statement about the progress of the liquidation and the prospects of a distribution to the creditors.'

'Has the liquidator of Court Line Ltd. submitted six-monthly accounts since that company went into liquidation?' asked Mr. Walker.

Mr. Clinton Davis replied: 'Six monthly accounts from the date of the winding up order made against Court Line Ltd. on 7 October 1974, for successive periods up to 6 April 1976, have been sent to the department by the joint liquidators of the company.'

Second International Hovercraft, Hydrofoil and Advanced Transit Systems Exhibition

Mr. Stephen Ross (Isle of Wight) asked how much was contributed by the Department of Trade to the Second International Hovercraft, Hydrofoil and Advanced Transit Systems Exhibition held in Amsterdam from 17 to 20 May inclusive.

'£18,650,' said Mr. Meacher.

Grants to yacht charter firms

Mr. Cranley Onslow (Woking) asked if the English Tourist Board had made any grants to yacht charter firms.

'I am advised that the English Tourist Board has offered one such grant, part of which has been paid,' said Mr. Meacher.

Pollution at sea

Mr. John H. Cordle (Bournemouth East) asked for a statement detailing progress regarding the introduction of legislation to implement the 1973 International Convention for the Prevention of Pollution from Ships.

'As I have said previously, there are a number of technical problems to be overcome before the 1973 Convention can be fully implemented,' said Mr. Clinton Davis.

'In consequence of a UK initiative in IMCO the obstacles to ratification are to be specially reviewed at the next session of that organisation's Marine Environment Protection Committee at the end of November. A paper to be tabled by the UK delegation is being prepared, and I will send a copy to the Hon. Member when it is ready.'

Mr. Cordle also asked how many incidents of oil pollution affecting coastal waters have been observed or reported in the past 12 months; and what has been the cost to the Exchequer of undertaking any remedial measures to deal with such pollution.

Mr. Clinton Davis answered: '100 sighting reports of oil slicks at sea were received by my department during the period 1 July 1975 to 30 June 1976. Remedial action was in general taken only in cases of confirmed reports where coastal pollution was threatened.

'The cost to my department of the seven occasions on which action was required amounted to some £90,000. Of this total some £80,000 related to instances in which the polluting ships were identified, and claims for reimbursement will be made against the owners or insurers of these vessels.'

Shipbuilding

Mr. Peter Horden (Horsham and Crawley) asked for an estimate of world demand for new ships by 1980 and of the production capacity, and present production, of Japan, Sweden and the UK together with employment in shipbuilding in each of these countries.

Mr. Huckfield said: 'According to recent OECD studies, by 1980 the average annual demand for new ships is likely to be between 10 and 12 million gross tons, and world capacity is expected to reach 50 million gross tons by 1978. Production in 1975 totalled 17.0 million gross tons in Japan, 2.2 million gross tons in Sweden, and 1.2 million gross tons in the UK. Comparable figures on employment are not available.'

Computers

'What was the total production from computer firms in the UK in 1975?' asked Mr. Gordon Wilson (Dundee East).

Mr. Williams told him that provisional sales of the principal products of the UK electronics computer industry, including work done on customers' installations, in 1975 were valued at £484.8 million.

Kearney and Trecker Marwin

Mr. Robert Taylor (Croydon North West) asked what was the price paid for the third A preference shares in Kearney and Trecker Marwin Ltd. at present held by the Department of Industry and for which an offer of 20p each has been made under the proposed scheme of arrangement.

'£1 a share,' said Mr. Williams.

Lonrho and Brentford Nylons

Mr. John Lee (Birmingham, Handsworth) asked what assurances were secured from the board of Lonrho Group that no other source of money was available for the finance of its acquisition of Brentford Nylons before sanctioning the recent £5 million loan, and what account was taken when allocating the sum of £5 million to the Lonrho Group, of the saving to the group from its not

Ministers at the Department of Industry

Secretary of State for Industry: Eric Varley
Ministers of State: Alan Williams
Gerald Kaufman
Parliamentary Under-Secretaries of State: Lord Melchett
Leslie Huckfield

Ministers at the Department of Trade

Secretary of State for Trade: Edmund Dell
Parliamentary Under-Secretaries of State: Michael Meacher
Stanley Clinton Davis

Ministers at the Department of Prices and Consumer Protection

Secretary of State for Prices and Consumer Protection: Shirley Williams
Minister of State: John Fraser
Parliamentary Under-Secretary of State: Robert Maclennan

having to secure an equivalent capital loan on the market.

Mr. Williams replied: 'The purpose of the loan is to save the 1,800 jobs in special development areas, and David Whitehead would not have proceeded with the acquisition of the Brentford Nylons assets without this incentive. The Brentford Nylons workers and their trades union representatives were fully consulted and have welcomed the Government's aid and the Lonrho takeover.'

Mr. Lee asked if the Secretary of State for Industry would appoint government directors to the board of Lonrho in order to monitor the affairs of the group while the interest-free loan of £5 million is being spent and if he would appoint government directors to the board of Brentford Nylons following upon its acquisition by the Lonrho Group.

'Under the terms of the offer to David Whitehead my Rt. Hon. Friend has the right to appoint a government director to Brentford Nylons 1976,' said Mr. Williams. 'The loan will be closely monitored by my department.'

Disguised business sales

Mr. Paul B. Rose (Manchester, Blackley) asked if the Secretary of State for Prices and Consumer Protection would seek powers to prevent professional car dealers from selling from private residential accommodation and conveying to prospective purchasers that such sales as are made are private.

Mr. Fraser replied: 'This practice was covered within the Director General of Fair Trading's third reference to the Consumer Protection Advisory Committee under Part II of the Fair Trading Act. The committee's report 'Disguised Business Sales' was published on 25 May and I hope shortly to lay a draft order before Parliament giving effect to the Director General's proposals for controlling the practice.'

Car park exemption clauses

Mr. Robert McCrindle (Brentwood and Ongar) asked if the Secretary of State for Prices and Consumer Affairs would refer to the Director of Fair Trading the practice of car park owners of imposing wide and excessive exemption clauses on members of the public using car parks.

'No,' said Mr. Fraser. 'I hope to deal with such practices in legislation to be based on the Law Commission's Second Report on Exemption Clauses (HC 605). I understand that one major car park operator has by agreement with the Director General of Fair Trading ceased to use such clauses.'

Blacknest Centre Production Control Group

Mr. Robert Taylor (Croydon North West) asked how much government money is involved in sponsorship of the Blacknest Centre Production Control Group.

'The amount of money so far spent by my department on sponsorship of this group is £161,042,' said Mr. Williams.

Financial assistance to industry

Mr. Norman Tebbit (Waltham Forest, Chingford) asked how often financial assistance has been given under Section 7 of the Industry Act 1972 in England; what is the total amount of assistance that has been given; and how many jobs have been created as a consequence.

Mr. Williams said that up to 30 June 1976, offers of assistance totalling £92 million were made in respect of about 1,700 projects located in England and expected to create about 120,000 new jobs.

Tuesday, 20 July

Lonrho and Brentford Nylons

Mr. John Lee (Birmingham, Handsworth) asked for assurances that no emoluments payable to directors of the Lonrho Group in respect of any extra responsibilities consequent upon its acquisition of Brentford Nylons would be paid in any country in which UK tax law does not operate.

Mr. Williams replied: 'The question of directors' remuneration is a matter for the shareholders subject to the provisions of the White Paper "The Attack on Inflation: The Second Year" (Cmnd. 6507).'

European Consumers' Consultative Committee

Mr. Frank Hooley (Sheffield, Heeley) asked the Secretary of State for Prices and Consumer Protection to list the main findings of the recent meeting in Brussels of the European Consumers' Consultative Committee; what are the constitution and the powers of the committee; and if she intends to be present at the next meeting.

'I propose to take the three questions together,' said Mrs. Williams. 'The EEC Consumers' Consultative Committee is appointed by the Commission of the European Communities. I have therefore no ministerial responsibility for the committee, and I would not normally be invited to its meetings. Questions on this subject may be raised in the European Parliament.'

Modifications to the Price Code

Sir John Langford-Holt (Shrewsbury) asked the Secretary of State for Prices and Consumer Protection: 'On what grounds she bases her judgment expressed in paragraph 36 of Part I of Command Paper No. 6540, "Modifications to the Price Code", that "the taking of deposits from clients and the receipt of interest on such deposits, can be regarded as part of a normal trading activity of the firm"; and whether in view of the judgment in Northens v. White she will reconsider her position?'

Mrs. Williams answered: 'The case which I assume the Hon. Member has in mind (Northend (Inspector of Taxes) v. White and Leonard and Corbin Greener and Others) is a tax case. I am not persuaded that identical principles are always appropriate for fiscal and price control purposes. I have, however, received a number of comments on the proposals in Cmnd 6540, which I am considering.'

Nationalisation of ship repairing companies

Lord Trefgarne asked for the names of the three smallest ship repairing companies to be nationalised under the Aircraft and Shipbuilding Industries Bill together with the names of the three largest ship repairing companies not to be nationalised, and also for the precise criteria by which the identity of these companies was established.

Lord Melchett said: 'Paragraph 3 of Schedule 2 to the Aircraft and Shipbuilding Industries Bill sets out the criteria for ship repairing companies whose shares are to vest in British Shipbuilders. In terms of turnover in the relevant financial year, the three smallest ship repairing companies named in the Bill which are not already in the public sector are, with the smallest first, J. B. Howie Ltd., The Wallsend Slipway and Engineering Co. Ltd., and Western Shiprepairers Ltd. There are a number of companies engaged in ship repair which for one reason or other do not fulfil the criteria set out in Schedule 2 to the Bill and it would be inappropriate to rank them.'

Wednesday, 21 July

Report on Lonrho Group

Mr. Arthur Lewis (Newham North West) inquired about complaints from the directors of Lonrho that the Government leaked details of the report on investigations into the company's operations to countries overseas; and asked to what extent in this case and others where investigations have taken place into a company's affairs details of these have been sent to persons overseas before notification to the company concerned and the House.

'No copies of the report were made available to overseas governments before publication,' said Mr. Dell. 'Advice on probable local reaction was sought, in confidence, in May from certain British Posts abroad who were told for this purpose of the main conclusions of the report. Mr. Rowland told my department that he was aware of this action.

'A copy of the report was forwarded to the company, in accordance with the provisions of Section 168 of the Companies Act 1948, on 5 March, four days after it was submitted to the then Secretary of State. This was well before information about its contents was passed to selected British Posts abroad. There is no provision in the Act for a copy to be laid in the House.'

NEB report on British Leyland

Mr. George Park (Coventry North East) asked for a statement on the National Enterprise Board's report on British Leyland.

Mr. Varley said: 'The National Enterprise Board have recently examined British Leyland's performance since October 1975 – the beginning of the company's present financial year – and have carried out a review of BL's first long term corporate plan. The NEB have made a full report to me: they are satisfied that the corporate plan provides a sound framework for the future development of the company and is in accordance with the broad strategy of the Ryder Report. They consider that the company's achievements have outweighed some disappointing aspects of performance and that the trend of improvement fully justifies the first tranche of £100 million. The Government accept the conclusions of the NEB report.

'I am placing in the Vote Office, the Printed Paper Office, and the libraries of both Houses, copies of the NEB's own summary of their report to me.

'It is the Government's intention that while the larger part of the funds required by BL this year should be made available from the NEB's resources, £30 million should be provided under Section 8 of the Industry Act 1972, through a direction to the NEB under Section 3 of the Industry Act 1975. I am tabling a motion today in accordance with the

requirements of Section 8, seeking the consent of the House to the provision of this amount. There will be an opportunity to debate this before the summer recess.

'The Government continues to support the basic strategy set out in the Ryder Report, with its emphasis on a programme of capital investment necessary to restore BL's competitiveness by transforming facilities and rationalising the model range. The provision of finance will continue to be conditional upon achievement by the company. Much remains to be done but my first hand contact with the BL management and workforce representatives leads me to endorse the NEB's view that an encouraging start is being made.'

Submersibles

Lord Ironside asked how many submersibles are at present registered under the Merchant Shipping Acts; how many of these are less than 15 gross registered tons; what proportion are foreign owned; whether the gross tonnage of submersibles will be one of the registered measurements determined, when these craft are required to be specially registered as submersible apparatus under Part IV of the Merchant Shipping Act 1974, from 17 July 1976; and whether registration of other types of life support apparatus would be included in the regulations now being introduced by the Department of Trade.

Lord Oram answered: 'Two British-owned submersibles are currently registered in the UK as ships under the Merchant Shipping Act of 1894; both of them having a gross registered tonnage of less than 15 tons. Gross registered tonnage is not included in the general description required for registration under the provisions of the Merchant Shipping (Registration of Submersible Craft) Regulations 1976. The regulations will embrace all manned mobile submersible apparatus which is designed to maintain some or all of its occupants at or near atmospheric pressure.'

Thursday, 22 July

Air freight

Mr. A. J. Beith (Berwick upon Tweed) asked for an assessment of the extent to which air freight is being transferred to road transport for the domestic part of its journey instead of being flown direct from provincial airports.

Mr. Clinton Davis said: 'Comprehensive information is not available on the amount of air freight involved, but the movement of air freight by road is referred to in Chapter 7 of Part 2 of Airport Strategy for Great Britain which deals with the regional airports. It will be a matter for consideration in the consultations on that document.'

Cotton shirts from China

Mr. Nicholas Winterton (Macclesfield) wanted to know the Department of Trade's criteria for deciding whether the UK is suffering from the dumping of cotton shirts from the People's Republic of China.

Mr. Meacher answered: 'In the case of market economy countries imported goods are normally regarded as dumped if the export price from the country of origin is less than the price at which the goods are being sold on the home market. This latter is known as the "fair market price". Where, as in the case of the Republic of China, the system of trading in the country of origin is such that a fair market price cannot be determined in this way, the standard of comparison is the price obtained for goods of the appropriate description exported to the UK from a third country, with adjustments to ensure comparability. If the goods, allegedly dumped, are found on investigation to have been exported to this country below the fair market price and to have caused material injury to the applicant industry, action would be taken to correct the situation.'

Anti-dumping investigations

Mr. Winterton asked for a list of all commodities, currently being imported into the UK, which have been accepted for investigation under the anti-dumping regulations.

Mr. Meacher listed the following commodities at present under full anti-dumping investigation:

dumper trucks
steel reinforcing bars
single-barrelled shotguns
double-barrelled shotguns
single beam atomic absorption spectrophotometers
PVC coated fabrics
men's leather fashion footwear
alarm clocks
hexamine
ophthalmic lenses.

Computer exports

Mr. Gordon Wilson (Dundee East) asked what were the exports from computer firms in the UK in 1975.

Mr. Meacher said that in 1975 UK exports of electronic computers and related equipment were valued at £331 million fob.

Hong Kong mass transit project

'How many jobs will be created by contracts awarded to British firms who have won contracts in the Hong Kong mass transit project?' asked Sir Paul Bryan (Howden).

Mr. Meacher said: 'It is not practicable to make a precise estimate but the award to British firms of five electrical and mechanical engineering contracts worth in total approximately £55 million will certainly provide a considerable stimulus to employment in the industries concerned.'

Sir Paul Bryan asked to what extent British technology and equipment is being used by local non-British firms which have successfully tendered for various contracts in the project.

'I understand that there will be a significant British contribution, valued at £1.6 million, to a civil engineering contract awarded to a local non-British company,' said Mr. Meacher. 'British firms may secure other sub-contracting business in due course.'

Sir Paul Bryan referred to the fact that British companies have won five out of the eight electrical and mechanical contracts announced by the Hong Kong Mass Transit Railway Corporation and asked if the Secretary of State for Trade would point out to British industry the opportunities open in Hong Kong to progressive British companies.

'Yes,' said Mr. Meacher. 'The British Overseas Trade Board and my department will continue to keep British industry informed of opportunities in the Hong Kong market. The Senior British Trade Commissioner in Hong Kong will be visiting Britain shortly and expects to talk to businessmen in different parts of the country.'

Terry Report on Film Industry

Mrs. Gwyneth Dunwoody (Crewe) asked the Secretary of State for Trade what plans he has to implement the recommendations of the Terry Report on the future of the British Film Industry.

Mr. Dell's reply is published on page 305.

Modifications in the Price Code

Mr. Ioan Evans (Aberdare) asked the Secretary of State for Prices and Consumer Protection, what modifications she now proposes to make in the Price Code.

Mrs. Williams' reply is published on page 302.

Petrol prices

Mr. Arthur Lewis (Newham North West) asked for an estimate of the effect of the 1p to 3p rise in petrol prices on the cost of living.

Mr. Maclennan answered: 'Since one major oil company has announced that it will not be putting up its petrol prices, it is difficult at this stage to define the final effect on average retail prices throughout the country.

'The direct and indirect effects on the Retail Price Index of a 1p increase in the average retail price of a gallon of petrol is estimated to be about one-fifteenth of 1 per cent.'

Food subsidies

Mr. Michael Neubert (Havering, Romford) asked how much was spent on food subsidies, in current prices in 1974-75; how much of that was spent before 10 October 1974; and how much was spent in 1975-76 and 1976-77 to date, respectively.

Mr. Maclennan set out expenditure on food subsidies as follows. He explained that it was not possible to give figures for the period from 1 April to 10 October 1974 without disproportionate cost; expenditure is therefore shown to 30 September 1974.

£ million

	1974/75 April/ March	1 April-30 Sept. 1974	1975/76 April/ March	1976/77 1 April-30 June
Milk†	324.8	126.6	283.7	85.6
Butter*	71.2	26.6	113.6	20.8
Cheese	38.7	8.9	58.7	13.2
Bread	62.6	21.4	77.6	16.0
Flour	3.9	0.1	7.9	1.8
Tea	16.4	1.1	30.2	7.8
Total	517.6	184.7	571.7	145.2
* Includes FEOGA expenditure:	11.6	4.9	21.4	3.8
† Includes expenditure under Appropriation Acts	46.4	—	10.1	—

Friday, 23 July

EEC-Yugoslavia MFA

Mr. Winterton asked for a statement on the recent MFA negotiations between the community and Yugoslavia; and for details of the agreement as it affects the UK.

Mr. Meacher replied: 'Negotiations between the community and Yugoslavia under Article 4 of the Gatt Multifibre Arrangement were successfully concluded, and the text of a bilateral restraint agreement was initialled, on 25 June. The agreement provides for community quotas on cotton fabrics (with a sub-quota for fabrics other than grey and bleached) and on cotton household linen. There is also a binding consultation clause on a number of products including shirts and suits. A Notice to Importers giving full details of the UK share of the quotas will be issued shortly.'

Company reports

Mr. Dudley Smith (Warwick and Leamington) asked if the Secretary of State for Trade intended that all relevant trade associations and organisations should be invited to comment on any proposals to alter the law on company reports; and if he would send his consultative document on the subject to them, and for the names of those organisations and bodies who had received his consultative document on company reports.

Mr. Clinton Davis said: 'I have published no proposals to alter the law on company reports. A recent preliminary draft by officials of my department on the aims and scope of company reports is generally available on request. Comments on this document by trade associations and other representative organisations will be welcome.

'Over 600 interested parties have requested copies of the document but it would not be appropriate for me to name them.'

Exports of cattle and sheep

Mr. F. A. Burden (Gillingham) asked what was the increase in deadweight exports of cattle and sheep from 31 May 1975 to 1 June 1976 as compared with the same period in 1974-75.

'Exports of live cattle increased from 35,497 tons to 43,574 tons and of live sheep from 4,588 tons to 11,017 tons,' said Mr. Meacher.

Shirts from China

Mr. Winterton asked if action would be taken to limit the current levels of imports of manufactured shirts imported from the People's Republic of China.

'Imports of most manufactured shirts from the People's Republic of China are already restricted under a quota which also covers other textile items,' said Mr. Meacher.

Steering Committee on Pilotage

Mr. John Prescott asked if the SCOP report on pilotage service was a unanimous report; whether Trinity House was represented on the committee; and who were their representatives.

Mr. Clinton Davis said: 'The Report of the Steering Committee on Pilotage (SCOP) was signed by all members, on the understanding that the organisations which they represented would have the opportunity to submit observations on it. Trinity House were represented on the committee by their then Deputy Master, Captain David Tibbits and by Captain J. A. N. Bezant, an Elder Brother.'

Mr. Prescott referred to the recent ballot of Trinity House pilots and asked if the Department of Trade still accepts the recommendations of the SCOP report.

'The Government accepts the SCOP recommendations as set out in the policy statement of 12 December 1975,' said Mr. Clinton Davis. 'In the reorganisation of pilotage arrangements in districts, account would be taken of local views including those of pilots.'

Maritime Fruit Carriers

Mr. Prescott asked how many British seamen are employed on British registered vessels of the Maritime Fruit Carriers Co. or its subsidiary company.

Mr. Clinton Davis answered that according to the latest information available some 525 British seamen, including masters, were employed on UK ships owned by the Maritime Fruit carriers organisation.

Ship-repairing industry

Mr. Dafydd Wigley (Caernarvon) asked: 'What was the value of the ship-repairing industry in the UK last year in terms of turnover and in terms of the balance of payments?'

Mr. Huckfield said: 'The value of ship repair work (including improvements and conversions) carried out in UK commercial yards in 1975 was £150 million. It is estimated that £30 million of this was on vessels registered abroad. No information is available on repair work done outside the UK on ships registered in the UK.'

Regional development grants

Mr. Robert Kilroy-Silk (Ormskirk) asked what was the amount of money spent on regional development grants: in Wales, the North-West and on Merseyside in the last financial year.

Mr. Williams gave the amount of regional development grant spent in the last financial year viz.: 1 April 1975 to 31 March 1976 in: Wales, £47.052 million; North-West, £47.907 million.

'While no precise figures are available for Merseyside since these are included in the total for the North-West, it is estimated that about half the North-West regional development grant goes to Merseyside,' he said.

Industrial production

Mr. Churchill (Stretford) asked in which months since March 1974 industrial production exceeded the average production achieved during the three-day week.

'It is estimated that industrial production exceeded the average level achieved during the three-day week in each month from March 1974 to March 1975 and again in May of this year,' said Mr. Huckfield.

SE Transport Users' Consultative Committee

Mr. John Ovenden (Gravesend) asked for a list of the members of the South Eastern Transport Users' Consultative Committee, their occupations, and upon whose nomination they were appointed; and which members were appointed because of their connection with commuters associations.

Mr. Fraser gave the following list:

Name	Occupation where appropriate
Mr. P. W. Milligan (Chairman)	Retired
Mr. E. G. Allen	Retired
Mr. W. E. Broughton	General manager
Mr. W. Burnett, MIPR	Director of South East England Tourist Board
Mr. E. G. Feben	Secretary of Sandown/Shanklin Golf Club
Mrs. J. Harris	—
Mr. W. Myers	Lecturer
Mrs. H. Jonas	—
Mrs. D. Rhodes	—
Mr. D. H. Silvester	Quantity surveyor
Mr. C. H. Smith	Quantity surveyor
Brigadier J. Sandberg, CBE, BSc	Retired
Rev. J. W. Martin	Rector
Mr. D. A. West	Farmer
Mr. J. F. Symonds	Retired
Mr. S. P. White	Transport manager
Miss M. Denby	Lecturer

'Members of the committee are appointed after consultation with a wide range of individuals and organisations concerned with the interests of rail users, including commuters' associations, and the committee represents the interests of the rail travelling public as a whole,' he said.

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HMSO BOOKS

European Community News

New timetable for community budget

Last week, the EEC's preliminary draft budget for 1977 came up for consideration for the first time, at the budget council on 22 July.

A few days earlier, during a debate on the subject in the House of Commons on 19 July, Chief Secretary to the Treasury Joel Barnett explained that this was the first time that the House had been able to discuss the preliminary draft budget before its discussion at the first budget council, when the draft budget incorporating the council's decision is established.

He pointed out that in previous years, the commission had submitted the preliminary draft budget by 1 September under the timetable laid down in the Treaty of Rome and that this year presentation had been brought forward, by informal agreement, to 15 June. The treaty timetable meant that the scrutiny committee was unable to examine the preliminary draft budget except during the recess and that the House had previously been unable to debate it before the first budget council at the end of September. The position this year, he told the House, was an improvement in that respect, and was in part at least due to a UK initiative.

He went on to explain that the change in the timetable was on an experimental basis this year and the community would have to consider at the end of the year whether the advantages outweighed the disadvantages.

Turning to the size of the preliminary draft budget, Mr. Barnett said that this year's commission proposals totalled 9,260 million units of account (£3,858 million) compared with agreed budget provisions of 7,637 mua (£3,182 million) in 1976. This represented an increase of about 22 per cent. But, he explained, this was not really comparing like with like, since the current 1976 total did not take account of the substantial supplementary budget for 1976 which the commission had just put forward. The latter amounted to some 632 mua, which was needed mainly to provide for the budgetary consequences of the agricultural prices review in March this year, but also for expenditure on food aid and aid to Portugal, offset by gains on foreign exchange transfers.

Mr. Barnett went on to outline the provisions in the budget, pointing out that, as usual, a large proportion of the budget was accounted for by estimated expenditure on agricultural support, that was, under the guarantee section of the EAGGF. The reason for this preponderance of agricultural expenditure, he said, was well known. It was the one area in which the EEC had taken over virtually the whole of expenditure which would otherwise be borne by the member states.

'What I have said explains the present position,' he continued. 'It does not imply that we are happy either with the total sum devoted to expenditure on agricultural guarantees, or with the balance between agricultural and other expenditure within the budget.' But neither of these issues could be pursued to any great extent by the budget council. It's task would be to ensure that the budgetary provisions properly reflected the cost of carrying out existing agricultural policy, so far as this could be forecast.

In addition to this, he said, the UK would want to question the presentational innovations of including the appropriations needed because of the 'double exchange rate effect' in a chapter outside the Feoga titles and thus hiding part of the cost of agricultural expenditure.

'We shall also want to challenge the assumptions which the commission have made in forecasting monetary compensation amounts – a devaluation of the representative – "green" – rate.' He added that in practice these were a matter for member states' decisions.

'Finally we object, as do most member states, to the inclusion in chapter 100 of appropriations for the 1977 Cap price fixing. We, and other member states, have previously emphasised that the provision of such a "contingency reserve" is unacceptable.'

Mr. Barnett explained that the other main expenditure items were less complicated and said that on the question of staff, the aim would be to limit the increase in staff numbers to those which were strictly necessary.

In the case of the regional development fund, he said that the main question would be whether the commission's proposed payment appropriations – 500 mua – were realistic, given the slow speed at which claims were coming in so far.

On the social fund, he said that in the current economic situation he believed that the commission's proposals for 619 mua for commitment appropriations was probably of the right order of magnitude.

He also said that he expected to press at the budget council for the inclusion of provision for aid to non-associates as a means of impressing on other member states the urgency with which the UK believed a decision in that area was needed.

As far as the presentation of the budget was concerned, Mr. Barnett explained that a major issue in this year's budget discussions would be the wider use of separate commitment and payment appropriations. The system was already used for the regional development fund and for research and investment, where it was introduced for expenditure under programmes covering several years.

The commission had proposed that this system should in future be used in all parts of the budget where expenditure occurred under programmes extending over more than one year.

The draft budget approved by the council on 22 July included a total payment provision of 8,659 mua. With commission agreement, the payment provision for the regional development fund was reduced to 400 mua, since it was felt this was a more realistic estimate of expenditure in 1977.

The council agreed commitment appropriations of 580 mua for the social fund, but the reserve of 200 mua to cover the cost of the 1977 Cap price fixing was deleted.

The level of aid for non-associates will be decided by the council after the development council in September.

UK committed to restraint on milk price

Among the major questions discussed by EEC agriculture ministers at their council meeting on 19 and 20 July was the proposed action programme for restoring the balance in the market for milk and milk products.

In a statement in the Commons on 23 July, Minister of Agriculture, Fisheries and Food Fred Peart explained that possible interim measures for improving intra-community trade in sheepmeat and the effect of the drought on agriculture within the community were also discussed.

Most member states, he said, set out their views in general terms on the proposed measures for milk and they would be further examined by the council with a view to reaching decisions in the early autumn.

'I made it quite clear,' he went on, 'that we remain committed to restraint on the common milk price, but would be ready to consider measures of producer co-responsibility subject to a firm prices policy.

'At the same time I left my colleagues in no doubt that we are totally opposed to the suggested tax on vegetable and marine oils and fats as part of any package of measures to deal with community milk surpluses.'

On sheepmeat, Mr. Peart said there was a discussion of possible improvements in intra-community trade, including access to the French market. Although there were points on which opinions differed and to which further consideration must be given, the council recognised that a sufficient measure of agreement existed to enable it to express the firm intention of reaching decisions on interim measures for improving trade in sheepmeat at its September meeting.

As a result of the discussion on the drought, certain temporary measures to alleviate farmers' difficulties were extended. The council had also decided to introduce a compensatory amount on canned peeled tomatoes, which would benefit UK consumers, and agreed to take decisions by December on measures for improving the community's market in hops.

Community to decide on fishing zones by October

At their council meeting on 19-20 July EEC foreign ministers agreed to settle details of a commercial extension of their fishing zones to 200 miles by the beginning of October this year.

The meeting saw the agreement, subject to one outstanding point, to a declaration of intent which permits member states to decide by 1 October at the latest on the procedures for extending their fishing limits to 200 miles. They agreed that they might not be able to await the outcome of the United Nations Law of the Sea Conference before taking action. The declaration of intent contains a reference to the common fisheries policy. There is a declaration in the council minutes recording a British understanding, with which the Irish associated themselves, that this reference was without prejudice to the review of the revision of the CFP.

Presidential statement

Taking the chair for the first time, the Dutch Foreign Minister, Max Van der Stoel, made an introductory statement defining the role of the foreign affairs council and its working methods.

Explaining that in future he intended that the council should have a report before it on the work in progress at each meeting, he went on to outline the various areas of community business where, he said, early progress was necessary.

Direct elections

Ministers resumed the discussion on direct elections following the instruction from the European council for an overall decision on the subject before the end of July. But French constitutional difficulties about the proposed derogations to the UK and Denmark, allowing these countries to nominate members when the first elections are held, made it necessary to defer final decisions until the problem could be examined in London.

Mr. Hattersley explained that Britain's request for a derogation arose not from any 'reluctance or lack of intention', but from the fact that for practical legal reasons; this country might not be able to meet the June 1978 deadline. 'We are going to see if one of the texts being considered can meet the French problem without undermining ours.'

Joint European Torus

The council held an exchange of view on the joint European Torus (Jet) research programme on controlled thermonuclear fusion and ministers formed a favourable opinion of the rapid initiation of this project in the frame work of the community multiannual research and training programme (1976-80).

The necessary decisions will be submitted to the October council of research ministers.

Greek accession

Ministers agreed a statement for the opening of the Greek accession meeting on Tuesday 27 July and decided to hold a full-scale foreign council on that day.

EEC prices for cereals 1976/77

Details have now been published in a series of council regulations of the prices and compensatory amounts which will apply for the cereals year commencing 1 August 1976.

The relevant regulations are nos. 1150/76, 1151/76, 1619/76 and 1620/76, published in *Official Journal* nos. L130 and L180, of 19 May and 6 July 1976.

A further announcement will be made about the prices for rice and flour when the relevant regulations have been received.

Glasgow castings for European industry

Proof machined ball castings in AISI 316 stainless steel for the petrochemical and process industries under inspection at the Hillington, Glasgow, foundry of Dewramet (Triangle International). The company produces shell, machine and hand moulded castings in stainless steel, heat resistant and high alloys in individual weights from a few grammes to a tonne for a broad cross-section of European industry, including pump and valve manufacturers.

More on the EEC

Information on EEC matters and about member states can often be found in other sections of 'Trade and Industry'. For this week's additional news, turn to the following pages:

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Tunisia: possible continuation of tariff preferences for EEC goods

An article on the new EEC/Maghreb agreements, which appeared in the 2 July issue of *Trade and Industry*, referred to the Maghreb countries' obligation to give community exports no less than most-favoured-nation tariff treatment.

Under the terms of the original EEC/Tunisia agreement, Tunisia has since 1969 granted tariff concessions on certain goods originating in the EEC. Although no obligation now exists for Tunisia to continue to grant these preferences, it is possible that they may be continued for the time being.

It is not yet known whether in these cases the Tunisian authorities will require the movement certificates accompanying the goods for which preferential entry is sought to be supplied on forms EUR 1 and 2 or ATN 1 and 2. Until the situation is clarified, HM Customs and Excise will continue to supply and endorse EUR or ATN certificates for exports to Tunisia.

General inquiries arising from this notice should be addressed to: Commercial Relations and Exports Division, Department of Trade, 1 Victoria Street, London SW1H 0ET, tel. 01-215 3707.

Questions on documentation to: HM Customs and Excise, International Division, Adelaide House, London Bridge, London EC4R 9DB, tel. 01-626 1515 ext. 2454 and 2978.

Information on import duties, taxes, etc., may be obtained from: OTAR Section, Department of Trade, Export House, 50 Ludgate Hill, London EC4 7HU, tel. 01-248 5757 ext. 461.

EEC/Portugal additional protocol

An extension of the EEC/Portugal free trade agreement which was initialled on 10 June is now expected to be signed on 20 September. The European Assembly's wish to be informed of the additional protocol will delay the signing.

The provisions of the additional protocol (which was covered in an article in the 25 June issue of *Trade and Industry*, page 791) are expected to take effect not before 1 November 1976. Further details will be published when the agreement is signed.

International carriage of dangerous goods by road

The third edition of the European Agreement concerning the international carriage of dangerous goods by road (ADR)* was published by the Department of the Environment on 16 July.

Renumbering of classes

The text in this edition reflects the renumbering of the classes to accord with United Nations classification. Class 7 (radioactive substances) is now set out in schedule form in line with the international Atomic Energy Agency's 1973 revised edition of the *Regulations for the Safe Transport of Radioactive Materials*.

Agreement signatories

The European agreement concerning the international carriage of dangerous goods by road (ADR) was signed on 30 September 1957 by Austria, Belgium, France, Italy, the Federal Republic of Germany, the Netherlands, Switzerland and the United Kingdom. The agreement has since been ratified or acceded to by the German Democratic Republic, Poland, Portugal, Norway, Spain, Sweden and Yugoslavia. The purpose of the agreement is to ensure that dangerous goods being conveyed by road are able to cross international frontiers without hindrance provided that the substances concerned have been safely packed and are being safely carried.

* *European Agreement concerning the international carriage of dangerous goods by road* (ADR). ISBN 0 11 550395 1. HMSO. £6.00.

Introduction of revised standard industrial classification postponed

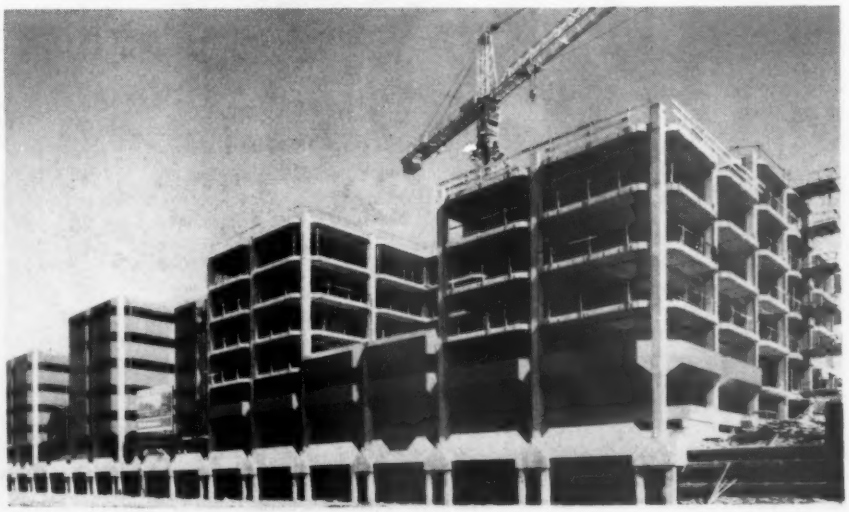
The introduction of a revised standard industrial classification (SIC) on a basis corresponding to 'Nomenclature générale des activités économique dans les Communautés Européennes' (NACE), when the major economic statistical series were rebased on the year 1975, has been postponed. Restrictions on staff have made it impracticable to carry out the extra work which would have involved compiling statistics on both the old and new classifications in order to provide an accurate link between the two.

As a result of the postponement, the rebasing of statistical series on the year 1975 will proceed on the basis of the 1968 SIC. The fully revised SIC will be published in 1980 in readiness for a further rebasing of statistics on that year. Until then industrial and economic statistics will continue to be classified according to the 1968 SIC, though some minor modifications to that classification will be considered for earlier implementation to take account of changes in the structure of UK industry since 1968.

Meanwhile a very detailed reconciliation of the 1968 SIC with NACE is being prepared to enable departments to provide statistics to the statistical office of the European communities on a uniform basis as close as possible to NACE.

Office development in Rotterdam

Ariel Developments Ltd., a company in which George Wimpey and Co. Ltd., have a substantial interest, announce that its Dutch subsidiary has let this 206,000 sq. ft (19,137m²) office development in the centre of Rotterdam. The deal is believed to be one of the largest single lettings in Europe in recent years. There will be five floors of offices over two floors of integral car parking for 326 vehicles. Gooch and Wagstaff are the retained surveyors to Ariel and their Dutch office advised on the acquisition of the site and throughout the development.



Moves to establish a community trade mark

Action to create an EEC trade mark has been initiated by the EEC commission. In a recently issued memorandum they stress that, for consumers, trade marks are indispensable to facilitate identification and choice of purchases by virtue of their role as an indicator of origin and quality. They are equally important to manufacturers as a means of promoting trade. The separate and differing national laws cannot provide satisfactorily for the growth of trade throughout the community.

The commission consider that there is a need to establish a community trade mark system which would be of particular value in establishing a free market for goods and services bearing trade marks and in ensuring fair competition. It would thus make a substantial contribution to encouraging trade within the community.

The memorandum takes as its starting point the draft proposal for a European trade mark which was published in 1973 to stimulate discussion.* Substantial changes are proposed to the earlier draft to take into account the views expressed and recent developments in community law.

Main features of the proposals

Under the proposals, EEC trade marks will be registrable in respect of both goods and services, and for collective and certification schemes. They will be available to all undertakings within the community and to foreign undertakings, subject to reciprocity.

All types of mark and 'get up' will be eligible for registration providing they are capable of distinguishing the origin of the goods or services for which they are to be used.

The right given by registration of an EEC trade mark will be the exclusive right to use the mark and will extend throughout the whole of the community.

The interests of consumers will be protected by prohibiting registration of marks which would deceive or mislead.

National trade mark laws will continue but will be harmonised in line with the EEC law: they will not give greater protection than the EEC law.

National trade mark rights established before the introduction of the EEC law will be respected.

EEC and newly registered national trade marks will be subject to rules ensuring the free flow of goods within the community.

Special arrangements will be made to settle conflicts between trade marks which might prevent free flow of goods. These include establishing a conciliation board attached to the community trade mark office to advise on how conflicts may be avoided.

Next move

The commission emphasise that the community law-making process enables interested parties to become fully involved. Their next move will be to establish a working party of government experts from member states. Written and oral consultations and hearings are envisaged before detailed proposals are drafted.

These proposals will be formally submitted to the council of ministers, and the European parliament, and the economic and social committee of the communities will be consulted. After revision in the light of comments received, a further submission will be made to the council of ministers when interested parties will be able to make representations to the council and its individual members.

In the UK, the Patent Office is seeking the preliminary views of the Standing Advisory Committee (Trade Marks) which is a widely representative body.

It will be recalled that in July 1973 the Government offered London as a site for the community trade mark office: that offer still stands.

The memorandum will be published by the commission in August and will be available from HMSO. Meanwhile copies may be consulted at the Science Reference Library, Southampton Buildings, Chancery Lane, WC2.

* DTI Proposed European Trade Mark – Unofficial translation of a Preliminary Draft of a Convention for a European Trade Mark – HMSO.

EEC/ACP council takes decisions on industrial co-operation

Decisions on the rules of operation of the two institutions of industrial co-operation set up under the Lomé Convention were taken at the first meeting of the EEC/ACP council of ministers in Brussels on 14 and 15 July. The decisions, which concern the Committee on Industrial Co-operation and the Brussels-based Centre for Industrial Development, entered into force on 16 July.

Ministers also adopted a decision under article 27 of protocol 1 of the convention derogating from the concept of 'originating products'. As a result, a small quantity of cotton gray cloth woven from basic materials not originating in the ACP area will be considered in the EEC as originating in Mauritius. Initially valid for 12 months, the decision may be extended for a further year after a review of the situation.

Part of the two-day meeting was devoted to an examination of the application of the convention's provisions on trade. In order to take account of the concern expressed by the ACP states in the sugar, beef and veal, rum, bananas and groundnuts sectors, ministers agreed that there should be further talks led by the presidents of the EEC and ACP councils – currently Max Van der Stoel of the Netherlands and George King of Guyana, respectively – in the autumn.

In an introductory statement Mr. Van der Stoel pointed out that on 1 July last year the community had opened all its markets to products originating in the ACP states – in almost every case free of customs duties and without the application of any quota barrier – giving the ACP states trade advantages which no other country had been offered. And, as far as products covered by the common agricultural policy were concerned, those originating in ACP countries had been allowed to enjoy more favourable treatment than products originating in third countries.

For the ACP states, Mr. King expressed a wish for more effective consultation with the community. He also pointed out the ACP states' concern regarding the extension of trade advantages by the community to other, non-ACP, states with more advanced economies.

The EEC/ACP council noted with satisfaction the measures taken to implement the stabilisation of export earnings (Stabex) provisions of the Lomé Convention; only a few days before the meeting, transfer agreements involving a total of more than 71 million units of account for 1975 had been signed between the community and 16 ACP states. Ministers agreed that the ACP states' wish for a number of amendments to Stabex should be examined by the institutions of the convention.

Ministers gave approval in principle to the accession of several newly-independent states – Sao Tome Principé, Cape Verde, Papua New Guinea, the Comoro State, Surinam, and the Seychelles – to the Lomé Convention. In the case of the first three, accession will take place on the conclusion of negotiations with the community. The other three are associated with the EEC under part IV of the Treaty of Rome, and are merely required to deposit instruments of accession.

Other items on the agenda included the fiscal and customs arrangements applicable to contracts financed by the community, financial and technical co-operation, trade promotion and relations with the EEC/ACP consultative assembly.

Catalogues of Government Publications

Her Majesty's Stationery Office offer their customers a comprehensive service which will enable them to judge whether any other titles in the vast output of Government Publications would help them in their work or leisure. Full information about this service can be obtained by sending a postcard to Publicity Section, Her Majesty's Stationery Office, Room C46, Atlantic House, Holborn Viaduct, London, EC1P 1BN, asking for the CATALOGUE SERVICE LEAFLET.

Customs notices of interest to exporters

The following Public Notices issued by HM Customs and Excise relate to various aspects of export procedure. Copies of these Notices may be obtained from local offices of Customs and Excise, addresses of which appear in the telephone directory, or from the Secretary, HM Customs and Excise, 39-41 Mark Lane, London EC3R 7HE.

7	Drawback of Excise duty on mixed or blended beers.
17	Arrangements for preferential trade between the Channel Islands and the United Kingdom.
49	International co-operation: information document.
104	ATA carnets.
112	Authorised hours for Customs work at ports, airports and in long rooms and charges for attendance given at the request of merchants.
112A	Charges for attendance given at private premises at the request of merchants.
118	Samples imported for promoting export trade.
172	Hydrocarbon oils: drawback of Excise duty.
207	Re-imported goods: relief from Customs duty and value added tax.
210	Temporary importation of films and similar goods for copying, printing, etc., to fulfil export orders.
221	Duty relief under the Import Duties Act 1958, and pre-financing of Common Agricultural Policy export refunds.
224	Beer exported on drawback as merchandise: examination and sampling.
241	European Economic Community: Compensatory Levy.
275	Documentation of exports for statistical purposes.
276	Customs entry forms in the C273 Series: guidance on their completion.
290	Export of personal and household effects.
291	Effect of budget changes on claims for drawback.
300	Export reliefs scheduling scheme.
703	VAT: Exports.
704	VAT: Retail export schemes.
705	VAT: Tax free sales of motor vehicles to tourists, etc.
750 and Supplement	Community transit – this describes the system as a whole.
750A	List of Community transit offices.
750B	Community transit : Extension to cover Austria and Switzerland.
751 and Supplement	Notes on completing Community transit forms T1, T2 and T3 and Control Copy T forms.
751A	Notes on completing Community transit movement certificates.
752	Free circulation of goods in the European Community.
753	Community transit : the simplified procedure for goods carried by rail.
754	Community transit : Intra-Community treatment of the catches of fishing vessels registered in Member States.
755	Community transit : special control procedures.
756	Instructions on the use of loading lists as the descriptive part of Community transit forms T1, T2 and T3.
757	Community transit : Pre-authenticated movement certificate Form T3L.
800	EEC Common Agricultural Policy : Customs procedures in respect of export refunds, levies and licences.
810	EEC preferences : Free Trade Agreements between the EEC and the EFTA countries.
810A	EEC Preferences : EFTA countries. Simplification of the documentation system described in notice 810. Introduction of universal form of movement certificate.
811	EEC Preferences : Greece.
812	EEC Preferences : Turkey.
813, 813B	EEC Preferences : Israel.
814, 814B	EEC Preferences : Malta.
815	EEC Preferences : Morocco.
816, 816B	EEC Preferences : Spain.
818	EEC Preferences : Egypt.
819	EEC Preferences : Cyprus.
820, 820A	EEC Preferences : Lebanon.
821	EEC Preferences : Exported goods subsequently re-exported by another EEC country. Simplified procedure for sending evidence of EEC origin.
822	EEC : imports from Algeria, Morocco and Tunisia.
825	The ACP/EEC Convention of Lomé: tariff preferences.
830	Arrangements between Denmark and United Kingdom.

EIB lends further £23.1 million for UK projects

Two loans totalling the equivalent of £23.1 million (37.4 million units of account) have been granted by the European Investment Bank for projects in the UK.

The larger of the two loans, £17.6 million, goes to the Post Office for improvements to the telecommunications network in the north of England. It will be used to help finance a wide range of works, costing in total some £147 million, which will permit the installation of about 187,000 extra telephone lines in the north-east telecommunications region which covers the counties of Northumberland, Durham, North Yorkshire, West Yorkshire, South Yorkshire, Humberside, Tyne and Wear, Cleveland and a large area of Lincolnshire. Additional telex connections and datel (data processing) installations will also be provided.

The loan is the third so far granted by the EIB for improved telecommunications in the UK. In 1975 £17.5 million was provided for similar works in Wales and certain border regions and in February this year £17.3 million was provided for reinforcing the telephone network in Scotland.

Sea link with Ireland

The second loan, £5.5 million, has been granted to the British Railways Board to help finance the introduction of a modernised shipping service between the port of Holyhead in north-west Wales and the Irish port of Dun Laoghaire, south of Dublin. This is the most important passenger and vehicle sea route between Great Britain and Ireland, and is catered for at present by two separate services, one for passengers and mail and the other for vehicles.

The new service, which the bank is helping to finance, will be based on a large, modern multi-purpose ship (9,000 grt.), the *St. Columba*, which will have the capacity to carry about 330 cars or 35 large freight vehicles and 2,400 passengers. Together with improvements to port facilities at Holyhead, including a new ramp and mechanical gangways, it will cost about £22 million.

Both of the new loans have been provided for 10 years at an interest rate of 9½ per cent.

First annual report on the regional fund

The first annual report on the European regional development fund* has just been published, nine months after the fund began operations.

The present fund has another 18 months to run. Proposals for a new fund will be considered by the commission and member states during the course of 1977.

The first annual report is addressed to the council of ministers and the European parliament and is likely to be debated by the parliament in the autumn.

The report reflects falling gross domestic product in the community and rising unemployment, an even wider divergence of prosperity among the regions and the erosion of the existing fund by inflation.

It calls for the fundamental acceptance of the principle of additionality – clearly increasing national regional aid resources by the amounts paid from the fund – and for a greater concentration of the fund's limited resources on areas of the greatest need, both regionally and by industrial sector.

The report also calls for the best use of information about the fund to demonstrate that the community is concerned with local problems and can help solve them. Closer co-ordination policies with a regional impact, are also called for.

* First annual report of the European regional development fund Com (76) 307.

New EC legislation

The legislation listed below has been published in the *Official Journal of the European Communities* as indicated against each item. The *Official Journal* is now published in English and copies should be obtained from HMSO. Information about the items listed, in so far as other member states' requirements are concerned, is available to British exporters from Department of Trade, Export Services and Promotions Division, Export House, 50 Ludgate Hill, London EC4M 7HU (tel. 01-248 5757, ext. 7174/482/408). Other information may be obtained from the reference point given at the end of the item.

Common agricultural policy

The texts of the following regulations which affect the various agricultural sectors in the EEC have been published in the *Official Journal of the European Communities:*

General. Regulation (EEC) 1687/76 laying down common detailed rules for verifying the use and/or destination of products from intervention (*Official Journal* L190, 14 July 1976).

Fodder products. Regulation (EEC) 1667/76 laying down protective measures applicable to exports of fodder products (*Official Journal* L185, 9 July 1976).

EEC/Malta agreement: origin rules

The *Official Journal of the European Communities*, L185, 9 July 1976, contains the text of regulation (EEC) 1656/76 concerning the application of decision No. 1/76 of the EEC/Malta council of association derogating from the concept of 'originating products' for reception apparatus falling within heading no. 85.15 of the Brussels tariff nomenclature, and of decision no. 1/76 of the council of association.

Further information: Department of Trade, General Division, Kingsgate House, 66/74 Victoria Street, London SW1E 6SJ, tel. 01-215 5750.

EEC/Maghreb agreements

The *Official Journal of the European Communities*, L185, 9 July 1976, contains the following corrections to the texts of the EEC agreements with Algeria, Morocco and Tunisia, published in *Official Journal*, L141, 28 May 1976:

Algeria

Page 9, article 8(1), subheading 20.02A, first indent:
for: '– Forced mushrooms' read '– Cultivated mushrooms'
Page 13, article 12(2), second line:
The word 'annually' should be deleted.

Morocco

Page 105, article 8(1), subheading 20.02 A, first indent:
for: '– Forced mushrooms' read '– Cultivated mushrooms'.
Page 109, article 13(2), fourth line:
The word 'annually' should be deleted.

Tunisia

Page 202, article 8(1), subheading 20.02A, first indent:
for: '– Forced mushrooms' read '– Cultivated mushrooms'.
Page 206, article 12(2), fourth line:
the word 'annually' should be deleted.

Applications for copies of the 'Official Journal of the European Communities' containing the legislation referred to should be made to HMSO and not to the inquiry points given in the notices.

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Subscriptions and sales inquiries about *Trade and Industry* should be directed to HMSO at any of the following addresses: 49 High Holborn, London WC1V 6HB; 13a Castle Street, Edinburgh EH2 3AR; Brazennose Street, Manchester M60 8AS; 258 Broad Street, Birmingham B1 2HE; 41 The Hayes, Cardiff CF1 1JW; Wine Street, Bristol BS1 2BQ; 80 Chichester Street, Belfast BT1 4JY, or through any bookseller.

EDF IV: Biggest community aid fund yet

Britain's membership of the European development fund became effective on 1 April this year with the entry into force of the Lomé Convention. This article explains how the fourth – and largest – of the European development funds works and how British exporters can take advantage of the opportunities it presents.

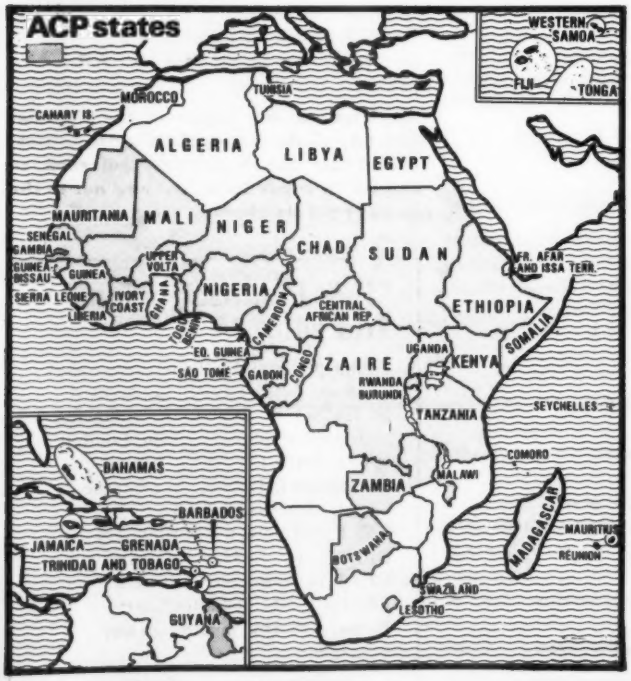
There is nothing new about access to European community money by developing countries for development purposes. The principle was established in the implementing convention to the Treaty of Rome. It was this that created the first European development fund (EDF I) to provide aid funds for the dependencies of three of the six founding members of the EEC from 1958–63. The fund was then renewed for two further five-year periods under the first and second Yaoundé conventions, and now, with the signature of the Lomé Convention on 25 February 1975, it has been renewed for the fourth time until 1980.

Under previous funds, which were financed solely by the original Six, British companies were not normally eligible to compete for orders. With Britain's accession, the community's links with the developing world established under the Yaoundé conventions had to be re-negotiated to take account of the economic relations between the UK and the developing countries of the Commonwealth. The Lomé Convention – the comprehensive aid and trade agreement between the EEC and the 46 countries in Africa, the Caribbean and the Pacific (the ACP states) – and EDF IV – to which the UK is the third largest EEC contributor (see chart right) – were the results.

The new fund, which became operational from 1 April this year, is the largest of the funds to date (see chart right), Administered by directorate-general VIII of the commission, EDF IV, which will make a total of 3,150 million units of account (mua)* available to the 46 ACP states over the four years to 1980, represents a considerable increase in the community's aid programme.

* The unit of account referred to in this article is the European unit of account (also known as the Lomé unit of account). This is a fluctuating unit of account based on a weighted basket of the currencies of the member states. The value of the unit changes from day-to-day and reflects the movement in the exchange rates between the currencies of the member states. Currently, £1 sterling equals approximately 1.6 units of account.

The 46 ACP states



Administering the funds

In a number of respects the fund differs from other multilateral agencies, particularly in its provisions for joint donor and recipient management of aid funds. The practice of administering aid by the ACP states and the EEC through joint institutions was established under the earlier Yaoundé conventions, and this has been continued and expanded under the Lomé Convention.

A joint council of ministers is responsible for overall supervision of the Lomé Convention with powers of decision and consultation. The ACP/EEC committee of ambassadors assists the council of ministers and supervises the various joint EEC/ACP working parties. Both the council of ministers and the committee of ambassadors are assisted in their task by the EEC and ACP secretariats. A political dimension is added by a consultative assembly consisting of members of the European parliament and representatives of the ACP states.

Day-to-day administration of the fund rests with the commission and the EDF committee, which consists of representatives of the nine member states and is chaired by the commission. The committee normally reaches its decisions on a unanimous basis, but there are provisions for reaching a decision on a vote. Approval of all projects undertaken by the fund is the responsibility of the committee. In the case of small projects and programmes, agreement is given on a general basis. Funding is on a pluri-annual basis and is not subjected to an annual budget. There are similiar provisions

The European community has contributed a total of 1.18 billion Mali francs towards projects in the Mali authorities' programme for the co-ordination of fisheries development in the Mopti sector.

for the examination of projects financed under the European Investment Bank.

In most of the ACP countries there will be a commission delegate supported by technical staff. His task will be to act as a link between the ACP country and Brussels and to supervise the progress of the community aid programme in the country or area for which he has responsibility.

Progressing the project

An EDF project passes through four main stages – programming, examination, execution and evaluation. Throughout these procedures both the ACP country and the commission have to be in agreement at each step of the procedure and neither side can initiate action without the agreement of the other.

Under EDF IV, small, high-level missions from the commission have been visiting each ACP country and drawing up indicative programmes consisting of individual projects put forward by the countries concerned. This phase is carried out jointly with the European Investment Bank and includes careful consultation with other member states. The indicative programme will form a working basis for aid to a country throughout the life of the fund, although it may be amended to take account of new circumstances or a change in government priorities.

As the next stage the individual projects outlined in the indicative programme are examined by DG VIII in the commission. If a feasibility study is required, then the commission may suggest a short list of consultants drawn from their index of consultants registered in the nine member states. Consultancies will be distributed in proportion to the member states' contributions to the fund. The choice of the consultants rests with the ACP state.

Then the method of financing the project is agreed. And here the EDF offers a wider choice of methods than most bilateral donors, ranging from non-repayable grants, very soft loans and loans at market rate with or without interest subsidy, to subscription to equity capital and joint funding with private enterprise.

An examination of the economic, social, commercial and organisational aspects of projects is carried out by DG VIII in co-operation with the country concerned. The commission delegate may also be involved and a mission may be sent from Brussels to assess the project.

When the commission and the ACP country are satisfied that the project merits community finance, the project is then presented by the commission to the EDF committee. If the committee approves a project, it then goes on to the execution stage, but if the committee cannot give its approval the ACP state has a right to appeal, first by presenting its own case to the EDF committee and, should this fail, by eventually raising the question in the joint EEC/ACP council of ministers.

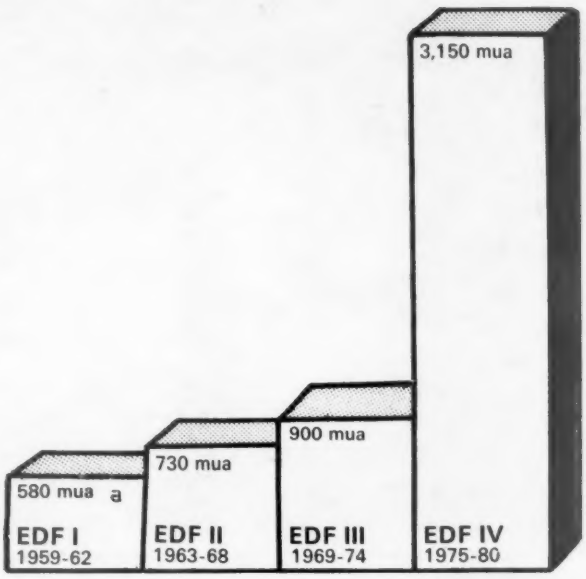
Calling for tenders

Once approval is given, the ACP state then has to draw up specifications and call for tenders. The tenders are normally limited to competition within the community and the ACP state, although competition can be wider when a joint project – with, for example, the World Bank – is involved. To assist the development of the ACP states a preferential margin of up to 15 per cent on contracts below 2 mua is given to local companies.

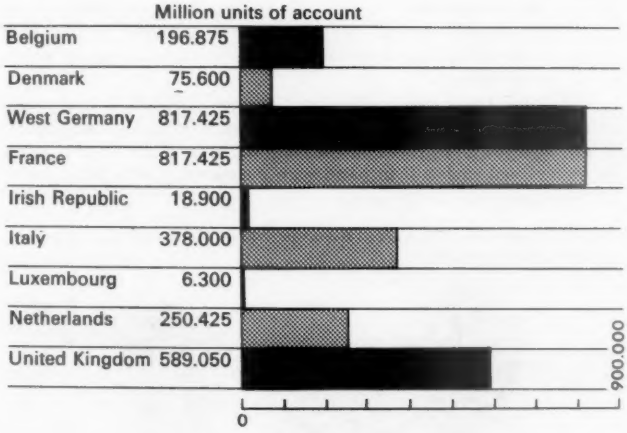
The closing date for bids is usually four months after publication for works contracts, and three months after publication for supply contracts. Contracts are awarded on a competitive basis and the award rests with the ACP country. To avoid the complexity of coping with different contractual legislation in the 46 ACP states there will be a standard EDF contract. The form of contract for EDF IV is currently under review to take account of the practices in the new member states of the Nine.

With the contract signed, work on the project can commence. In Brussels the principal authorising officer of the fund makes a credit commitment against the EDF for the amount of the project and proceeds to issue vouchers against which payments are made by the fund's finance officer. In the ACP country the government appoints a national authorising officer (usually a minister) who is responsible for the tendering procedures and the certification of payments to be authorised in Brussels. In certain circumstances the EDF rules provide for the commission to authorise payment on its own initiative. Payments are made in a mixture of the national

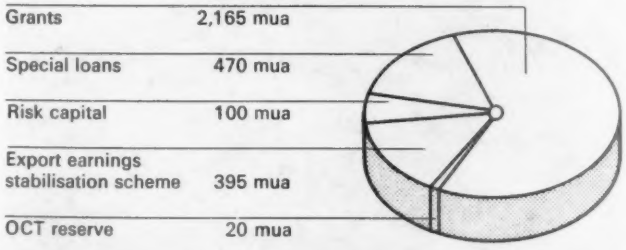
EDF IV: the largest fund to date



Member states' contributions



Community aid under the Lomé Convention


Grants 2,165 mua
Special loans 470 mua
Risk capital 100 mua
Export earnings stabilisation scheme 395 mua
OCT reserve 20 mua

Total Lomé Convention aid for ACP states and OCTs (dependencies) amounts to 3,150 mua. Provision is also made for up to 400 mua in the form of loans granted by the European Investment Bank from its own sources.

Thanks to the intervention of the EDF, 70 wells have been bored in Niger in regions where areas of land have been abandoned as a result of the absence of permanent wells.

currency of the contractor and the currency of the ACP state. This latter payment is the responsibility of the central bank in the ACP state.

Responsibility for executive control of the project belongs to a 'principal contractor', who may also be the national authorising officer, appointed by the ACP government. And the ACP state may request the commission to appoint experts to assist him in the supervision of new work. The commission delegate in the ACP state is responsible for monitoring the project's progress on behalf of the commission.

The Lomé Convention provides for joint EEC/ACP evaluation of a project during its execution and when it is finally completed. In the light of the evaluation, the commission and the ACP country concerned will each put in hand such measures as may be required for the success of the project.

Collecting pyrethrum flowers in Rwanda, where EDF funds are contributing to their cultivation.

Types of project

Figures for the first three funds show a strong bias towards transport and communication projects (over 37 per cent of all disbursements up to December 1973), with projects involving rural production taking up 29 per cent, and education and training third with 13 per cent. These overall figures conceal shifts in emphasis between the first and third EDFs. Aid to the health, education, water engineering and urban infrastructure sectors declined, while aid to rural production and industrialisation increased.

Under the Lomé Convention special emphasis is given to industrial development, marketing and sales promotion. A chapter of the Lomé convention (title III) is devoted to industrial co-operation and the convention aims to promote the development of the infrastructure necessary – transport, energy, research, training schemes, for example – if industrialisation is to take place. The convention also aims to foster the establishment of manufacturing industries, especially those which process raw materials, in the ACP states.

To help spread the benefits of industrialisation throughout a community, a special effort is to be made to develop small and medium-sized firms. Responsibility for the implementation of aid to industrialisation rests with a joint industrial co-operation committee.

The centre for industrial development

An important innovation under Lomé is the establishment in Brussels of a centre for industrial development. The centre's main role will be to act as a clearing house for information on opportunities for industrial co-operation between the Nine and the ACP states.

The centre will also sponsor feasibility studies, organise meetings of industrialists and promote contact between industries in the community and the ACP countries. An industrial information service will be provided by the centre, although here it is expected to draw on information held in various national centres, rather than maintaining an in-house capacity.

Trade and commodity earning stabilisation

Although not within the scope of this article, it is worth briefly mentioning the trade aspects of the Lomé Convention and Stabex – the community's export stabilisation scheme – since the trade opportunities may be reflected in the types of projects coming forward under EDF IV and the Stabex scheme may provide an additional line of development finance.

The Lomé Convention gives the ACP states duty-free access to community markets for a wide range of industrial goods and agricultural products. It is likely that these provisions will give an added impetus towards industrialisation which can be supported

This bridge over the Sangrougrou in Senegal was built by EDF funds.

by the EDF, both in terms of projects and through the centre for industrial development.

Under EDF IV, 375 mua have been earmarked for the Stabex scheme. Through this scheme an ACP state receives compensation if its earnings from any one of 12 key commodities (see right), which form an important element of its exports, fall below a reference level based on previous years' earnings. The compensatory payments take the form of loans repayable over the five-year life of the scheme. Countries are expected to make repayment when their commodity earnings rise above a given level. In the case of the 24 poorest ACP countries, no repayment is required. The recipient country is free to decide how to use the resources transferred, informing the community annually of its actions.

Opportunities for British companies

British industry, with its experience of markets in the developing world, should be well-placed to compete for business under EDF IV. Similarly, UK consultants with a proven record of success in development projects should be able to play an active part in operations financed by the fund.

Contracts for the supply of goods – vehicles and small items of plant for example – are often placed through local agents. A knowledge of the market and established local contacts is obviously advantageous but this should not deter companies from attempting to break into new markets. Goods and services contracts can also be undertaken by consortia of EEC-based companies and British firms with commercial links in the community may find this offers them additional opportunities.

The rules and operations of the EDF are designed to ensure that companies in all community member states compete on an equal basis. Details of projects and calls for tender under EDF IV are published in the *Official Journal of the European Communities* (available from HMSO).

Details will also be available to British exporters through the Department of Trade's Export Intelligence Service (EIS). To find out more about EIS, firms should contact the Department of Trade, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01–248 5757, ext. 430 or 556.

Consultants wishing to have their company included on the register of consultants should contact the commission direct. Registration application forms may be obtained from the EDF Finance Department (Consultancy Register), Commission of the European Communities, rue de la Loi 200, B 1040, Brussels.

Although information on the operations of the fund will be available in London and Brussels, under a comprehensive aid and trade agreement like Lomé there are bound to be opportunities which can only really be assessed on the spot and exporters should work to establish contacts and associations in the ACP states.

Inquiries

Inquiries about this article should be addressed in the first instance to the Department of Trade, Projects Sub-section, GES4A, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01–248 5757, ext. 7181 or 557.

Also available from this address is a free Department of Trade booklet, 'The International Lending Agencies', which describes the opportunities presented by EDF IV and many other multilateral agencies. Firms are asked to make their request for the booklet in writing, enclosing a self-addressed, adhesive label.

Stabex: the 12 key commodities

Ground nut products	Ground nuts, shelled or not. Ground nut oil, ground nut oil cake
Cocoa products	Cocoa beans, cocoa paste, cocoa butter
Coffee products	Raw or roasted coffee, extracts, essences or concentrates of coffee
Cotton products	Cotton, not carded or combed, cotton linctus
Coconut products	Coconuts, copra, coconut oil, coconut oil cake
Palm, palm nuts and kernal products	Palm oil, palm nut and kernal oil, palm nut and kernal oil cake, palm nuts and kernals
Rawhides, skins and leather	Rawhides and skins, bovine cattle leather, sheep and lamb skin leather, goat and kid skin leather
Wood products	Wood in the rough, wood roughly squared or half squared, but not further manufactured. Wood sawn lengthwise, but not further prepared
Fresh bananas	
Tea	
Raw sisal	
Iron ore	Iron ore concentrates and roasted iron pyrites

EEC environmental measures relating to industry

Check-list of draft and finalised proposals

This is a fourth published status list of those EEC environmental measures or proposals which should generally be of interest to industry (previous lists were published in *Trade and Industry* of 11 April 1975, 29 August 1975 and 30 January 1976 – proposals covered there are not listed here). The latest list covers the period 1 January 1976 to 30 June 1976.

The terminology employed in the list is largely self-explanatory. The designation 'proposal' signifies that this is the version of the draft as formally submitted to the council by the commission; the terms* council directive, recommendation, resolution and decision refer to the eventual end product – the text finally agreed by member states.

The texts of adopted EEC directives and regulations are published in the 'L' (Legislation) series of the *Official Journal of the European Communities* and the texts of commission proposals in the 'C' (Information and Notices) series. Thus texts will eventually be published twice – firstly in proposal form in 'C' series and later in final form in the 'L' series.

Readers requiring information on community work on environmental protection and improvement, as it relates to industry, should initially contact the appropriate Whitehall sponsoring division in the normal way. Readers will generally find that their trade association is fully up to date with events on the community front.

The next status list will be published in January 1977 to cover the period 1 July 1976 to 31 December 1976.

* Articles 189-92 of the Treaty of Rome explain these terms.

Subject	Status (where applicable)
Relating to the quality of bathing water	Council directive of 8 December 1975 (OJ 5/2/76 Vol. 19 No. L31)
On establishing a common procedure for the setting up and constant updating of an inventory of sources of information on the environment in the community	Council decision of 8 December 1975 (OJ 5/2/76 Vol. 19 No. L31)
On the dumping of wastes at sea	Proposal for a council directive (OJ 20/2/76 Vol. 19 No. C40)
On the use of fuel-oils with the aim of decreasing sulphurous emissions	Proposal for a council directive (OJ 8/3/76 Vol. 19 No. C54)
On health protection standards for sulphur dioxide and suspended particulate matter in urban atmospheres	Proposal for a council directive (OJ 19/3/76 Vol. 19 No. C63)
Adopting a research programme (1976 to 1980) for the EEC in the environmental field (indirect action)	Council decision of 15 March 1976 (OJ 20/3/76 Vol. 19 No. L74)
Concerning a research and development programme of the EEC in the field of environmental protection: second environmental research programme (1976 to 1980)	Commission communication concerning a council decision of 15 March 1976 (OJ 3/4/76 Vol. 19 No. C78)
On the disposal of polychlorinated biphenyls and polychlorinated terphenyls	Council directive of 6 April 1976 (OJ 26/4/76 Vol. 19 No. L108)
On pollution caused by certain dangerous substances discharged into the aquatic environment of the community	Council directive of 4 May 1976 (OJ 18/5/76 Vol. 19 No. L129)
On the continuation and implementation of a European Community Policy and Action Programme on the Environment	Draft council resolution (OJ 24/5/76 Vol. 19 No. C115)
On the conclusion of a convention on the protection of the Mediterranean Sea against pollution and a protocol on the prevention of the pollution of the Mediterranean Sea by dumping from ships and aircraft	Commission proposal for a council decision (OJ 3/6/76 Vol. 19 No. C122)
On the limitation of noise emission from subsonic aircraft	Proposal for a council directive (OJ 9/6/76 Vol. 19 No. C126)
On establishing a uniform procedure for the exchange of information on the quality of surface fresh water in the community	Proposal for a council decision (OJ 14/6/76 Vol. 19 No. C133)

Listed below are proposals known to be in preparation but not yet sent to the council

Criteria and quality standards for CO (directive)
Quality of water for freshwater fish (directive)
Quality of seawater for shellfish (directive)
Negotiation of conventions on prevention of marine pollution from exploitation of the sea bed (decision)
Disposal of dangerous and toxic wastes (directive)
Sampling and measurement methods for quality of surface waters for drinking (directive)
Discharge of wastes to underground waters (directive)
Siting of power plants (recommendation)
Water pollution charges (recommendation)
Monitoring of water
Water measurement methods
Aquatic life
Birds
Amendment to 1967 directive on dangerous substances (screening of chemicals)

Do you use statistics?

The Government Statistical Service (GSS) prepares a wide range of reliable and detailed figures on the United Kingdom. It is usually worth checking to see if what you want is available from them. You can see many Government statistical publications at your local public library, buy them from HMSO or refer to the comprehensive collection held at the Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4N 7HU (tel. 01-248 5757 ext. 368).

A free pamphlet, *Government Statistics – a brief guide to sources*, gives up-to-date contact points in Departments for further information. You can obtain copies from regional offices of the Department of Industry or by writing to the Central Statistical Office Press and Information Service, Great George Street, London SW1P 3AQ.

EEC information at the frontier

This weekend a small army of models wearing community T-shirts will be distributing over a million pamphlets about the community at 24 frontier crossing points, including the ferry terminals at Calais, the Hook of Holland, Ostend, Holyhead and Fishguard.

Into Sweden

Trade and Industry special report: Quality rather than quantity is the prime requirement of the Swedes. This feature looks at the market and the experiences of British companies already established there.

the quality market

Before you fly to Sweden

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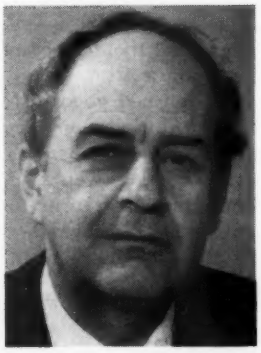
ENCIRCLE TI 148 ON PAGE 358 FOR FURTHER INFORMATION



Sir Derek Ezra, chairman, European Trade Committee, British Overseas Trade Board

Sweden is an excellent market for the UK by any standards. In the 1960s, we and the Swedes acquired duty-free access to one another's markets for industrial goods under the terms of the Efta Convention and this proved to be an important stimulus to our trade. Last year we sold no less than £825 million-worth of exports to Sweden with its population of just over 8 million or nearly half as much as we sold to the USA. Sweden is Britain's seventh best customer and purchases per capita more than £100-worth of goods each year from us. Furthermore, these exports nearly balance our imports from Sweden.

Our membership of the EEC has not affected our trade with Sweden because, under the terms of the free trade agreement concluded in 1972 between the expanded community and Sweden, we have preserved almost intact the free trade built up under Efta. Although the members of the community who were not former members of Efta are now well on the way themselves to attaining free trade in industrial goods under the provisions of that same agreement, the trade figures for the first quarter of this year show that our exports continue to expand despite this increased competition on the Swedish market. There is a tradition of Anglo-Swedish trade going back to the 17th and 18th centuries when the majority of the merchants of Sweden's chief port, Gothenburg, were British. They were mainly Scots and many of Sweden's leading families still bear Scottish names.

To that extent, the North Sea has tended to unite us rather than to divide us. The Swedes like to do business with us but of course – and I cannot emphasise this point too strongly – they expect us to be fully competitive not only on price (which should not be an insuperable problem nowadays) but also on reliability of deliveries and on after-sales service. English is spoken, and spoken well moreover, by most Swedish businessmen and communications both to the country and within it are excellent. Apart from her natural resources of iron ore, forests and water power, Sweden has an impressively broad industrial base and a high level of industrial activity. But one would not expect a country of 8 million people to be self-sufficient in all the equipment and components which she needs for the export industries on which her remarkable prosperity depends.

Many British firms have already been in the Swedish market for several years and these are the enterprises which have helped us to hold on to our 13 per cent share of Sweden's imports through thick and thin. As the upturn in Europe's economy comes, still more British firms should be able to find a place in this important market. The following report shows what could be done by going about it the right way.

Trade and Industry special report
Published with the 30 July 1976 issue.

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Even Sweden, with a higher gnp per head than the United States, has been affected by the world economic recession. Dick Best, who has just finished three years as first secretary (economic) at the British Embassy in Stockholm, looks at the current state of the Swedish economy.

Sweden's economy today

Just across the North Sea, Sweden is the largest and richest of the four Scandinavian countries which provide an export market comparable in value to North America. In 1975 the Swedish gnp per head was highest in the world apart from Kuwait and Switzerland, and ahead of that of the United States, West Germany, France or any of the major industrialised countries.

British exporters have long grasped the opportunities for selling in this wealthy country which is currently our seventh largest market. Last year British visible exports to Sweden were worth £825 million despite a drop in the value of Swedish imports. This year they should easily top the £900 million mark. The total Swedish import bill this year should be equivalent to £10,000 million. Our share of around 10 per cent has declined slightly in recent years. A major cause has been the development of the Swedish oil refinery industry, providing a substitute for product previously imported from Britain.

On the other hand there is little doubt that the environmentally-conscious Swedes will be anxious to obtain low sulphur crude oil from the British sector of the North Sea. There is no reason why, aided by greater competitiveness in price and improved exporting techniques, the British share of the market should not increase by several percent to bring it back to the level enjoyed during the 1960s in a much smaller market.

Like most of the countries in Western Europe – and more than 70 per cent of her trade in both directions is with this area – Sweden has been affected by the economic recession. This has influenced her in two ways: her exports of finished goods such as cars, electrical machinery, ships and mining machinery to customers themselves affected by the recession have slowed down. Secondly, as a major producer of raw materials from her forests and iron ore mines, she has also experienced a fall-off in demand for these commodities. For a country whose pulp exports are the highest in the world and whose exports of iron ore and timber are third and fifth highest respectively, this has been a serious blow to export earnings. Now that there are positive signs that the recession is receding stockpiles of these raw materials should be one of the first sectors to come back into demand.

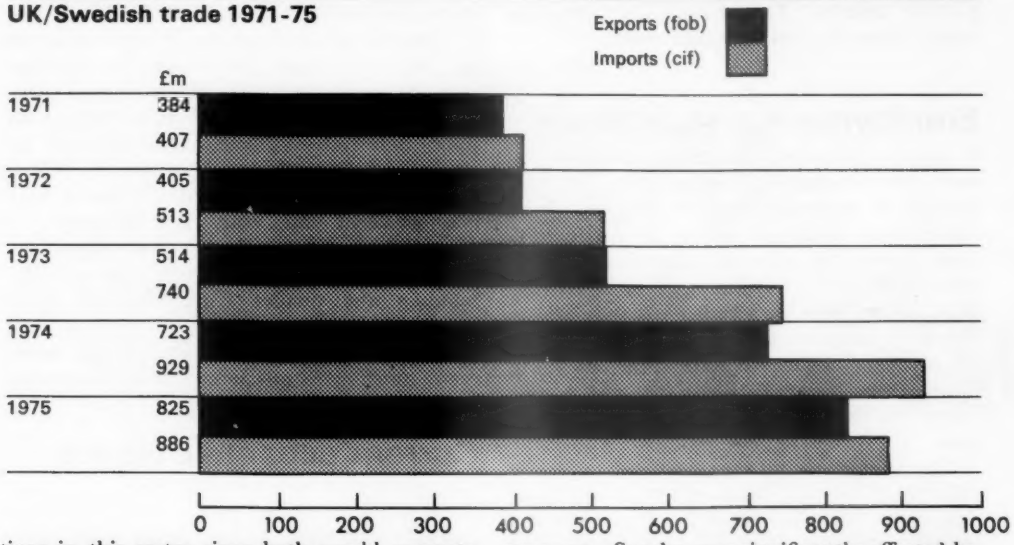
Swedish exports fell off in volume by nearly 19 per cent in 1975, but are expected to stage a recovery this year and to expand by about 7.5 per cent. There are signs that the decline in the Swedish engineering industry may have been halted and exports of finished goods are expected to stage a recovery during the next year, although more slowly. The Swedes themselves forecast some fall-off in competitiveness of their exports as the world situation returns to normal, partly because of the relatively higher rise in cost production due to inflation in Sweden due to high wage settlements.

Sweden's industrial background

The contribution to Sweden's gnp of the forest and mining industries is of major importance. But approximately one-third of her production in fact derives from manufacturing industry. For a country with a population of just over 8 million, the list of Swedish international companies which are household names throughout the world is impressive. These include Aga, Electrolux, Alfa Laval, Gränges, ASEA, L. M. Ericsson and SKF, as well as the motor and aero industries represented by Volvo and Saab. Swedish shipyards such as Kockums and Götaverken have been world leaders in tanker production although many of their ships can now, sadly, be seen laid up along the fjords of western Sweden.

With the exception of hydro-electricity (which accounts for only about 16 per cent of electricity supply) Sweden is without natural resources in terms of oil, gas or coal to provide power for these industries. She has plans to develop a modern and expanding petrochemical industry. Domestic refinery capacity was increased from 40 to 60 per cent in 1975 and there are plans for a further refinery which would make her very largely self-sufficient in refined oil product. Swedish plans to develop other sectors of the petrochemical industry at Stenungsund are at an advanced stage, but may be affected by parallel Norwegian inten-

UK/Swedish trade 1971-75



tions in this sector since both would compete for the Scandinavian market. Opportunities for British suppliers to these industries and to the off-shore industry through exports of machinery, plant and consultancy and financial services of all kinds are many. When the worldwide operations of the subsidiaries of these great Swedish companies are also included – and many of the purchasing decisions are made in Sweden – the potential for doing business is even more impressive.

Industrial structure

Nearly all Swedish manufacturing industry is in the private sector and many of the industrial groups are linked through the financial and managerial infrastructure provided by the banking system. Emphasis has for many years been heavily upon efficient management, technological skills and harmonious and well-informed labour relations. Senior management drawn mainly from graduates in engineering and economics plays a major part in the success of Swedish industry. Labour relations have been notably harmonious since before the Second World War. Wage negotiations are conducted directly by extremely well-organised trade union groups on the one hand and equally powerful employers' organisations on the other.

Both sides of industry regard thorough economic education for both management and trade unionists as essential. There is widespread co-operation in training schemes. It is no exaggeration that most Swedish workers see the prosperity of their particular industry as affecting the national economy and therefore their own well-being. At the same time work conditions are almost universally good, environmental and welfare aspects are given first priority and employers pay a heavy contribution towards the social security of their workers. In addition, a payroll tax, also paid by the employers, has helped to lift part of the income tax burden from the lowest paid.

Energy crisis

Because of the heavy dependence upon imported oil – needed for heating as well as industrial purposes – Sweden was significantly affected by the changes in the world structure of crude oil prices beginning in 1973. Some 80 per cent of her total energy needs are supplied by oil with most of the remaining power coming from hydro-electric stations. The Swedish Government has responded to this challenge with an energy programme which includes establishment for a state petroleum company charged with seeking assured supplies from overseas, expansion of refinery capacity, and a major programme of nuclear power station building designed to be completed by the mid-1980s. Domestic uranium sources were explored and Sweden joined the International Energy Agency.

Recession

Like her principal trading partners among the industrialised nations, Sweden was affected by the recession which followed the rise in oil prices. In 1973 she had a balance of payments surplus of £500 million which in 1974 was turned into a deficit of almost the same size. Demand for her raw materials slackened and exports of manufactured goods declined seriously. The Swedish Government took a number of financial measures between 1974 and 1976 to protect the domestic economy from these consequences. Grants and loans for stockpiling by industry were made available and will continue until the end of the current year. Accumulated counter-cyclical funds placed voluntarily with the Bank of Sweden (partly as a tax relief measure) were extensively released to all sectors of industry to maintain investment levels and further tax concessions provided for investment in machines. The Bank of Sweden reversed its previously highly restrictive policy on overseas borrowing and, from the beginning of 1975, gave strong encouragement to companies, local authorities and even public utilities to raise loans on foreign markets. Swedish companies were undoubtedly helped in this way to overcome cash flow problems. The balance of current payments in 1975 registered a deficit of approximately half that of the previous year. Largely as a result of overseas borrowing, foreign currency reserves rose in 1975 by 40 per cent and now stand at around

£1,910 million. The Krona, a European 'snake' currency, has remained strong.

Employment and inflation

A major consequence of these measures has been the restriction of unemployment in Sweden to approximately 1.5 per cent of the labour force (although there is an equally high level of concealed unemployment in the form of relief work and retraining). The Swedish Government have been rather less successful in checking inflation. Consumer prices are now 12 per cent higher than in June 1975, an increase which can be attributed partly to a costly two-year wage settlement reached last year.

The rising wage bill causes serious concern to many Swedish economists who see a related decline in the competitiveness of Swedish industry. On the other hand, the official forecast is for a fall in the rate of inflation during the second half of the year to around 8 per cent. Short-term measures taken by the government include an extension of the price freeze to include milk and flour from 1 July. In addition, an additional subsidy of £85 million is being made to agriculture to help maintain the existing price freeze on most other basic foodstuffs originally introduced in December 1972.

Despite the recession the Government have consistently maintained their commitment to assist developing countries both through an expanded foreign aid programme and through the extension of trade liberalisation under the Gatt. However, in the autumn of 1975 on grounds of safeguarding economic independence, which is a cardinal point in her traditional policy of neutrality, the Swedish Government introduced global quotas for imports of footwear. At the same time, a system of surveillance licensing for imports of textiles was announced.

The first of these measures met with considerable criticism in the Gatt, in Efta and from the European community which invoked retaliatory clauses against certain imports of Swedish forest products. Recently the Swedes announced their intension to draw up later this year a timetable for dismantling the global quota system affecting footwear imports. In consequence relations with the community have much improved.

Short-term outlook

The latest forecast of the Swedish National Institute of Economic Research predicts that the economic recovery will accelerate in most of Sweden's major markets. This should stimulate her exports considerably. Growth rates of about 20 per cent in volume are forecast for iron ore, wood products and pulp exports. Export prices for these commodities are expected to rise by about 3 per cent. Imports will probably also rise in 1976 although on a small scale, with a price rise of about 5 per cent for total imports.

However, actual production of raw materials as well as of finished goods are expected to increase relatively little over 1975 levels despite increased export demand, largely because of use of stockpiles built up over the past year. Production in some sectors such as engineering, chemicals and textiles will continue to rely for some time yet on Government support for stockpiling. Overall growth of gnp in 1976 is now forecast at 2 per cent compared with 0.2 per cent last year. Unemployment is expected to stay below 2 per cent although there may be a rise in some sectors such as shipbuilding and textiles. Total domestic price increases for the year are forecast at 8 per cent by the government although private sector economists regard this figure as over-optimistic.

Current economic issues

The political scene in Sweden during the past three years has been complicated by equal representation in parliament between the social democratic government generally supported by the communists and the three non-socialist opposition parties. Measures designed to increase state participation in manufacturing industry have been heavily criticised. These include major expansion of the state-owned NJA steelworks at Lulea in the far North and use of the state pension fund to purchase equity shares in major Swedish industrial enterprises such as Volvo. Other topics of economic debate have included the amendment of labour laws in such a way as to take away from employers the sole right to direct work without consultation with trade unions and the controversial proposals of Dr. Meidner of the Swedish TUC under which part of the profits from private industry would be channelled into a fund to be used for the purchase of shares for the workers. Under the Meidner proposals, these workers' funds would eventually acquire a controlling interest.

The largest of the opposition parties, the Centre Party, has expressed its opposition to the government's nuclear reactor programme on grounds of hazard and threat to the environment. These are long-term issues. Few, if any, are likely to be settled for many years. A general election is to be held on 19 September. Public opinion polls suggest that after 44 years in office the Social Democrats may lose office. In addition to the issues already mentioned, the result may be influenced by general discontent with the personal income tax system. Both sides are committed to some degree of reforms but how far anything more than palliatives can be produced is uncertain.

Whatever the result the outlook for the Swedish economy based on abundant raw materials, harmonious labour relations, effective management and financial control is good, Sweden will almost certainly sustain her position as one of the strongest economies in the world. She will remain a first-class market for British exporters provided they do not forget that Swedish requirements in delivery, performance and quality and after-sales service are also amongst the highest in the world. But the prizes are worth the effort.

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To the Swedish businessman, efficiency, quality and reliability are the main criteria for success – and he expects his suppliers to think likewise. Alan Williams assesses the Swedish industrial scene today and identifies some past faults and future prospects.

The quality market

For most people, Sweden is synonymous with neutrality, Social Democracy – and one of the highest standards of living in the world. But the implications for potential exporters are less clear; is this a lucrative market to be nurtured, or a highly-developed arena wherein one will encounter sophisticated competition? In fact, it is both.

In UK terms, Sweden is a small but highly developed, discerning market. Its 8.2 million population is less than that of Greater London but its small size belies its importance; with exports now running at £1,000 million per year, it is Britain's seventh largest overseas market. Salary levels are about twice as high as in Britain, but are accompanied by high taxation and cost of living. The relatively small population and therefore limited potential workforce necessitates a high level of automation and process control, but this well-developed industrial democracy is nevertheless also moving towards a 6-hour working day, with 5 weeks annual paid holiday. Apart from cigarette manufacture, no industries in Sweden are entirely State owned – even the railways and the electricity supply industries are partially privately owned. On the other hand, the sale of pharmaceuticals and wine and beer are state-controlled.

Like most advanced industrial countries, and especially because of its geographical location, Sweden is now very energy conscious. Rather surprisingly, for a country famed for its hydro-electric schemes, 85 per cent of its energy needs are met from hydrocarbon rather than hydro-electric sources.

The Swedish Government is well aware of this great dependence on oil, and is seeking to decrease reliance on this form of energy, and to accelerate the switch to nuclear power, which it eventually sees as meeting 40 per cent of the total electrical energy demand. There has been some opposition to the proposals, as might be expected in such an environmentally-conscious country, although it is difficult to see how else the Swedes can continue to keep their homes at 21°C in the depths of winter at reasonable cost! In some areas, notably Malmö-Lund, district heating has been installed and there are other proposals to utilise nuclear and industrial waste heat. One recent proposal envisages investment of Kr2,000 million in energy-saving measures.

Swedes sell – and buy – on quality rather than price; the visitor to Sweden very quickly becomes aware of the total lack of 'cheap' goods, both in the consumer and capital markets. Generally the Swedes prefer to develop effective, stable links with good suppliers, rather than barter in the general market for the cheapest price; they have a narrow industrial base and use world markets to achieve the economies of scale. They import substantial quantities of components and machinery – 40 per cent of gnp involves foreign trade – and generally high costs mean that the accent is on high quality and level of competence in management. Efficiency, quality and reliability are at least as important to the Swede as price, and he expects his suppliers to think likewise. Yet it is precisely in this area that British performance over the past few years has not been good. Frank Murray, at the British-Swedish Chamber of Commerce, is convinced that much of this reputation for bad deliveries and indifferent quality stems from recent troubles in the motor industry. "Unfortunately, cars tend to be seen as a country's flag-bearer; if they are delivered late or are unreliable, it tends to reflect on all other products from that country." And bad reputations are hard to live down; although the Ford Transit van sells well, the continuing bad reputation of British cars so affected sales of the British-made Escort that Ford felt obliged to switch to the German-made version, and moreover to deliberately advertise it as such, thus by implication selling down British products. But it is not only troubles in the automotive industry which damage reputations; most Swedish people speak excellent English, and a surprisingly large number of the people I spoke to regularly read an English language newspaper or listen to the BBC; as a result, the Swedish business community has a well-developed knowledge of British industrial relations, but its outlook tends to be influenced by the media's penchant for disputes and strikes; in a country which has a disciplined, hard-working, professional workforce where strikes

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are a rarity, news of industrial unrest gives rise to particular concern.

But if deliveries can be guaranteed, and quality maintained, there is an excellent market for British goods in Sweden now, particularly at the upper end of the market, where comparable German-made goods are quite significantly more expensive. Austin Reed are now well established in Sweden, and just recently set up Austin Reed Scandinavia to handle their operations in Sweden and Denmark. Yet it was as recently as 1972 that Austin Reed first ventured into continental Europe with the acquisition of the Strom shops in Gothenburg and Stockholm. Two years later Bengt Cason brought his family businesses at Malmö and Lund into the group. 'By offering Quality with Service', says Cason, 'we have already got to the point where the continental operation accounts for 25 per cent of turnover'. A new store was opened in Stockholm late last year, and plans are afoot for modernising the others. Most of the merchandise is manufactured in Scandinavia, although British-made socks and knitwear are popular, and despite the fact that there is much more emphasis on leisurewear in Sweden than in Britain, the Chester Barry range of suits has been particularly well received. Only 10 per cent of the menswear business in Scandinavia is bespoke – considerably less than in Britain – and Cason attributes this to the highly developed system of sizes which gives as many as 78 different fittings.

Quality and efficiency

Quality coupled with efficient service has also been the backbone of success for EMI in Sweden. In addition to records, pre-recorded tapes and cassettes, the Group has successfully ventured into the fields of electronic medical instruments, fire detectors, burglar alarms and musical instruments and equipment. Director Anders Holmstedt reckons that as little as 20 per cent of the record, tape and cassette business is local music, the remainder being dominated by British or American artists. Rapid response to the transient demands of the popular music business is, of course, essential, and although records can be brought in swiftly from London – albeit with British labelling – the new factory at Amal, the first in Sweden, will take care of local productions, plus some offload from London, with appropriate labelling.

Despite the generally highly-developed consumer demand, the Swedish palate is less adventurous and more conservative than the British, according to Bill Russell, an Englishman and managing director of Cadbury Slotts AB at Uppsala, a wholly-owned subsidiary of Cadbury Schweppes and fourth largest food manufacturer in Sweden. The high percentage of families with working wives means that there is a great reliance on convenience foods. Expenditure on food accounts for about 30 per cent of domestic disposable income; prices are higher because of higher overheads, product and packaging taxes, and generally higher margins for wholesalers and retailers than would normally be expected in Britain. Prices also tend to be pushed higher by the Swedish demand for natural rather than chemical colourings. Russell sees the Swedish food market as being somewhat unique because, unlike most countries, distribution is largely managed by three main groups – KF (the Swedish co-operative movement), ICA (a voluntary buying and retailing chain) and DAGAB (a grouping of main wholesalers outside the other two). This makes for efficiency but tends towards a reduction of choice; outside the three main centres of population, the sparsity of the population and greater distances between townships rules out the direct manufacturer-retailer delivery system common in Britain. This, coupled with the lack of commercial radio and television, gives the wholesalers a strong influence over the market – an influence which can at times inhibit the test-marketing and development of new products.

Consumer goods price rises in Sweden during 1975 were among the lowest in Europe, but in recent months the Swedes have been unable to contain inflation, and the rate is now the fourth highest in OECD.

British manufacturers have, however, been able to hold their own and in some areas, particularly food products, furniture and clothing, are steadily expanding their market share.

On the industrial front Swedish industry, with its access to counter-cyclical funds and fiscal incentives for inventory building, is well-placed to mitigate the effects of a turndown in trade. Swedish industry is continuing to invest in plant and machinery and there is so far little evidence of a cut-back in investment plans; within the last few weeks a new £200 million pulp and paper project at Mönsteras has been announced. The large investment areas are power generation and district heating (both nuclear and conventional), and steel plant and petrochemicals. Since last year, Swedish industry has shown a growing interest in the offshore industry and individual companies are making determined attempts to break into this market. Other growth areas are electronics and electrical engineering.

Direct comparisons

Lars Palmqvist and Nils-Holger Thorsén are directors of G and L Beijer AB, Malmö-based import agents for foundry, steelwork and petrochemical equipment. They are in a position to make direct comparisons between the products and performance of British and German suppliers. Some British firms, says Palmqvist, are superb; he singles out Davy Ashmore International for particular praise – 'we can rely on them to deliver on time'. But there are others who are consistently late with their deliveries, blaming sub-contractors and rather obscure industrial disputes. Thorsén says British firms are either very good or very bad. 'And the bad ones give everybody a bad reputation. Their deliveries are bad, finishing is highly variable and they are reluctant to metricate or to incorporate new features in their designs to meet new customer requirements'. But he remains

confident that good firms can do very well; many Swedish firms prefer to work with British firms because of the traditional reputation for high quality and the greater knowledge of English, which is the second language of most Swedes. Palmqvist sees Germany very much as Britain's main competitor in industrial goods in Sweden; although prices are higher and quoted as at time of supply, the Germans are geographically closer and therefore often able to give quicker delivery.

One unusual feature of British-Swedish trade is the high proportion of British exports to Sweden in automotive components. In 1976, British suppliers will sell a record £100 million worth of components to Volvo and Saab Scania, representing rather more than 10 per cent of all Britains' exports to Sweden and making Britain the third largest supplier after Sweden and West Germany. But this increase over previous years is due largely to inflation and volume has actually decreased marginally. Delivery problems and rising prices have moved both Volvo and Saab Scania to re-source a large number of components, mainly to West German suppliers. This has eased the pressure on UK suppliers and delivery complaints are fewer, but UK companies will be hard pushed to regain the lost ground.

Auto industry optimistic

The Swedish automotive industry stood up well to the threat of recession. Volvo reduced its production of cars by 6 per cent in 1975 but increased its commercial vehicle production, while Saab Scania made no production cuts at its car plant and increased production of commercial vehicles. Both companies are optimistic about the future and should continue to be important customers for UK component manufacturers.

Helge Castell, Vice President of AB Volvo and Director of Purchasing, explains, 'Our concept is to look after basic assembly but to buy the parts from specialists – Sweden is too small to support a components industry of its own.' Volvo buys as many parts from Britain as it does from Germany – 'Buy British – Volvo does' is one of Castell's tongue-in-cheek claims – but he is quick to point out that whilst Volvo evaluates the quality, quantity, technical standard and innovatory performance of its suppliers, in an industry where quality control, planning and scheduling are highly developed, cost remains an important factor. 'And the cost advantage of British products,' says Castell, 'is being lost; but for the fall in sterling it would be gone already.'

But what about the much-publicised delays in delivery due to industrial troubles? Avoiding the direct answer, Castell says that he has to buy from various types of industrial society; sure there have been more serious interruptions to the supply of some British products than other competitors, but there has been no lost production at Volvo yet. 'It's the final product that matters. Some of our British suppliers are excellent – I would go so far as to say perfect – and there are others, German as well as British, who cause us problems.'

Looking to the future, Volvo sees the Japanese more as a challenge than a threat; 'Brazil is the country you have to watch', warns Castell. 'Only the US, Britain and Germany produce all the parts needed in the automotive industry. But in 20 years time, Brazil will be competing strongly in these markets.'

English is now the corporate language of AB Volvo, and they would clearly like to maintain their British contacts and suppliers. But this is not for sentimental reasons; although they have a large market share in the Nordic countries, with a total population of only 18 million in all

Kockums Shipyard, Malmö, with the assembly shop in the centre, and the 600,000 tdw building dock.

Scandinavia, they clearly have a firm eye on British markets. But even more importantly, the broad base of the British automotive industry, coupled with the low exchange rate of sterling, and the need to maintain alternative suppliers to Germany, makes Britain especially attractive to Volvo.

Sweden has large, sophisticated electrical and electronics industries. The local components industry is by comparison small and there is a constant demand for high quality sophisticated components met largely by West German, UK, British and Japanese manufacturers. Delivery delays and price escalation continue to be problems for UK companies, although there has been some improvement with regard to deliveries in recent months. Foreign competitors seem able to offer and to hold to fixed-price contracts for longer periods than the majority of UK suppliers.

Industrial raw materials and partially processed manufactures had a thin time in 1975; orders in hand have declined considerably, especially in the important export industries such as iron and steel, and paper and pulp. New orders are proving elusive, as for the rest of European industry, and this is bound to have a direct and damaging effect on the short-term prospects for an expansion of business by British suppliers of semi-manufactures. With its own iron and steel industry heavily orientated towards special steels of various kinds, Sweden imports significant quantities of steel in other categories. But the British Steel Corporation has been experiencing both price and supply problems, and there are hints of illicit undercutting by other suppliers. Chemicals, on the other hand, have done rather well and ICI are in a strong position, while English China Clays have a virtual monopoly of materials for the paper industry.

Promising prospects

In the building sector, prospects for British manufacturers are slightly more promising. Pilkington's floatglass plant at Halmstad came on stream on 2 July and the company has already anticipated this by strengthening its marketing structure to increase sales of float glass imported from Britain. Indeed, the market penetration has been such that the Scandinavian producers are proposing to merge to counter the Pilkington offensive, and the proposal is currently the subject of a Swedish Government investigation.

To the extent that counter-cyclical funds are used for extensions to factory premises, there will be increased opportunities for other British companies supplying semi-manufactures used in the building industry, and flat and house-building is at last showing some signs of an upturn.

With the coming on stream earlier this year of the 8 million ton Scanraff refinery, there has been a cut-back in the demand for products formerly supplied by British refineries. This has, of course, had a harmful effect on our trade statistics but, given the small value added by refinery operations on imported crude oil, in overall British balance of payments terms the effect is probably much less than the figures might suggest.

Invisible trade with Sweden during 1974/75, according to figures released by the Swedish Ministry of Finance, showed a balance in Britain's favour. UK earnings derive mainly from financial services, but transport services, consultancy, sales of TV films and advertising material also play a significant role. The four largest banks in Sweden have between them some 80 per cent of the commercial banking operation, most of the remainder being shared by nine provincial banks. Although banking and insurance activities in Sweden remain closely controlled by protective legislation, the Government economic policy since August 1974 has encouraged borrowing abroad by state organisations, local authorities and private companies, primarily to maintain investment levels, although there has subsequently been some tightening of control. This has greatly increased opportunities for British bankers. Re-insurance, notably in the marine field, has continued to be an important factor in British invisible earnings from Sweden.

Investment in each direction has shown a steady increase with the money flow, according to the bank of Sweden, slightly in favour of the UK. Whereas most new Swedish investment in Britain takes the form of expansion of long-established manufacturing concerns, British investment in Sweden has tended to take the form of takeover of existing companies, mainly for marketing purposes. In recent years, the Swedes have also been attracted to Britain for the low-cost production facilities. Prospects for 1976 are that invisible earnings will continue to make a substantial contribution to earnings, perhaps as much as 7 per cent.

Sir Sam Falle, British Ambassador in Sweden, is most impressed with Swedish industry. He believes that there are excellent opportunities for British goods in Sweden – each Swede already spends over £100 annually on British goods – and sums up the requirements for the successful exporter in one word – reliability. The Swedish tradition of developing effective and stable links with suppliers who are able to offer high quality coupled with impeccable delivery means that there is a better than average opportunity for companies prepared to plan their production sensibly over the medium to long-term. 'But', warns Sir Sam, 'there is no market here for companies looking for ad hoc short-term business. The development of successful trading performance in Sweden requires the establishment, either directly or indirectly, of a highly effective marketing organisation and a preparedness to back up local representation with absolutely reliable deliveries.' Unfortunately, some British companies either cannot or will not do this, and as a result our trade in recent years has suffered; the 14 per cent market share Britain enjoyed until four or five years ago, if maintained, would now be bringing £200–300 millions more than is the case.

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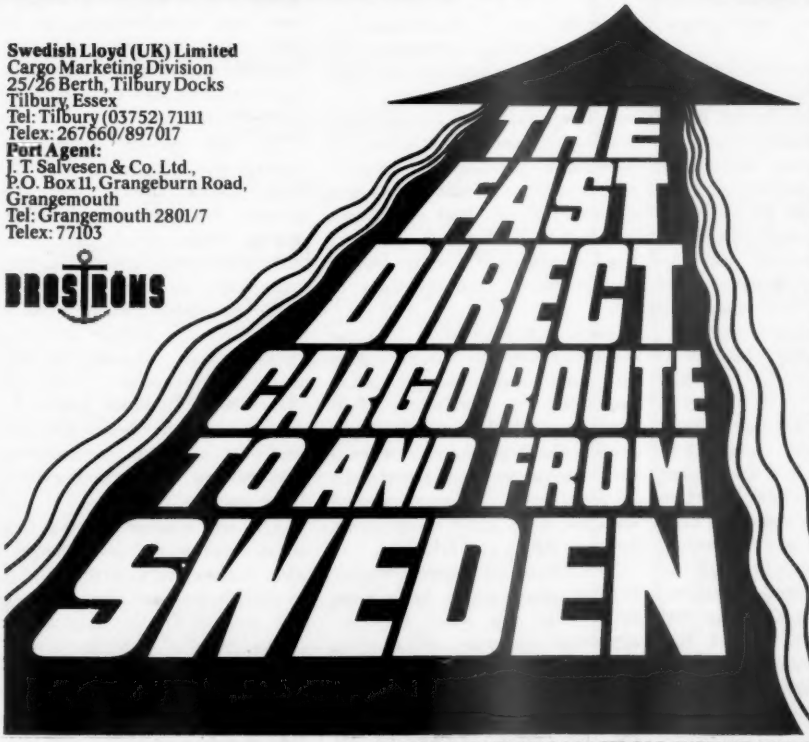

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Case studies

Bearing up

Bearings of all kinds have long been among Sweden's traditional industries and it is all the more surprising to find Britain's six-year-old precision bearing group Ransome Hoffman Pollard (RHP) making good progress in its exports there.

RHP formally came into existence in 1970 with the merging of three leading bearing companies and is now one of the world's 'top ten' in this international industry. The group employs 10,800 in 10 factories in Britain and has seven overseas subsidiaries.

The company recognises that in the long term success must lie in export markets and one of its planks to the future is an intention to double the export content of its turnover – at present about 25 per cent – and through diversification. No manufacturing is carried out outside the UK except for a small amount done in a part-owned plant in Italy.

Sales abroad are carried out through distributors and subsidiaries. Using a distributor, RHP feels, is better because he uses his own capital to fund the stocks, knows the local market and, of course, the language. In addition, in certain important countries, RHP appoints its own resident manager to liaise between the distributor and the UK company. Such resident managers are appointed where RHP can see a better level of potential for their products.

The role of the resident manager, a concept which was tried out earlier in Spain and Italy and found to work well, is to help the distributor to understand the UK company's policies and marketing strategy and to deal with technical queries. The presence of a representative provides a discipline for the distributor and allows the company to go forward on things like joint marketing exercises with the distributor on a more effective basis.

In Sweden the resident manager is John Carter, who liaises with the distributor, Nomo Kullager AB, who was appointed in 1973. Mr. Carter is based in Stockholm and looks after all the nordic countries, spending about two-thirds of his working time in Sweden.

It was not easy for RHP to get into the Swedish market because it is the home of SKF, a company which dominates the world bearing industry, but RHP have found that the size of SKF works both ways. Because the Swedish company is so big and dominant there is room for a newcomer to slide into some sectors and gain a foothold.

Among the manufacturers which RHP supplies is Volvo in the automotive industry, and the company is now beginning to supply some of the larger Swedish manufacturers with bearings of all kinds, often in a small way. RHP calculates that its share of the total Swedish bearing market is a few percentage points. Although the market is low at the moment there seem to be signs of an improvement in 1977 and a substantial rise in 1978.

RHP is looking forward to gaining an ever-increasing share of this manufacturing industry boom.

Kitted out

Airfix Export Ltd., part of the Toy Division of Airfix Industries, sells a wide range of goods in addition to the well-known model construction kits. These include toys, games, arts and crafts, including painting-by-numbers. In the overall break-down of sales, kits made up some 60 per cent and Airfix sees growth in all sectors, with perhaps comparatively more growth in the non-kit market than in kits.

Airfix began to break into the Swedish market for kits more than 20 years ago. The company appointed a distributor, Brio Scanditoy, which it still has, who are also the largest and best-known toy manufacturers in Sweden. In 20 years the market has developed with obviously good co-operation between Airfix and Brio.

The size of the Swedish market became significant to Airfix some seven years ago when Brio, an aggressive company which takes advantage of all the available selling opportunities, reorganised. As Brio's strength is in wooden toys the two product ranges do not clash too much, and some 80 per cent of Airfix products sold in Sweden are kits.

Airfix staff from London visit Sweden two or three times each year, not only to liaise with Brio, but to make their own independent market and stock surveys throughout the country so as to have an independent check on sales levels. At the same time they have excellent working relations with Brio staff, finding them very helpful.

One of the other areas of the toy market which is monitored by Airfix is the level of retail prices in the shops of both Airfix and competitors' toys, to compare selling prices. The devaluation of sterling has been used to advantage by Airfix in all its export markets. The company points out that kit prices are relatively cheaper abroad now than they were at the end of 1974.

The company's main competition in Sweden comes from the Japanese, who have large and flourishing kit manufacturing operations. One US and one British company are also creating new competition, but Airfix says that at the moment the newcomers are not making any impact in the market because of the comprehensive distributing coverage by Brio.

And the future? Airfix feels that the Swedish toy market will continue to increase at a steady rate of between 15 and 18 per cent per year. The company will be working harder to get a larger share of the non-kit market and in the medium term may have to move into part manufacturing in the UK, with Swedish packaging. Negotiations are well under way towards making this change in the non-kit sector.

On the general retail side Sweden is coming forward quickly with hypermarkets, and the general trend is towards larger selling units which are most attractive propositions to a company such as Airfix which can make the most of the large point-of-sale displays. Larger units will mean that the company can ship direct to the retailer – which also makes the distributor happy because he can offer better discounts and does not have his warehouse and working capital tied up with large stocks of goods.

The toy market is very consumer-orientated and fashionable. Fashions in toys come and go so quickly that sometimes they are not noticed. In the construction of kits, Sweden's young people – and fathers probably – are very skilful and Airfix looks forward to a long period of prosperity in the land of long nights.

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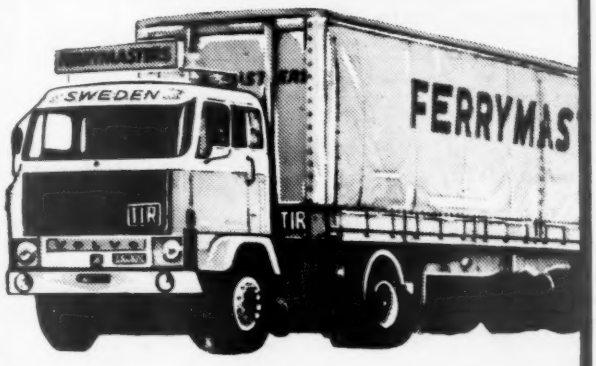

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Sweden at a glance

Comparative statistics

	UK	West Germany	Sweden
Population 1975	56.1	61.8	8.2
GDP 1975 (current prices)	224,700 $M	423,400 $M	69,000 $M
Growth in GDP 1965-75 (constant prices)	2.1%	3.2%	3.1%
GDP per capita 1975 (current prices)	4,005 $	6,851 $	8,415 $
World exports	43,756 $M	90,021 $M	17,406 $M
World imports	53,252 $M	74,208 $M	18,049 $M

Value of UK trade with Sweden

£ million

	UK exports	UK imports	Trade deficit
1973	514.3	740.0	225.7
1974	723.3	929.1	205.8
1975	825.6	858.8	60.2
Jan.-April 1975	274.3	314.2	39.9
Jan.-April 1976	301.4	342.4	41.0

UK exports to Sweden (principal items)

£ million

	1974	1975
Total	723.3	825.6
of which:		
Petroleum and petroleum products	126.7	121.9
Machinery other than electric	98.6	131.3
Transport equipment	80.4	101.8
Iron and steel	32.0	39.4
Textile yarn, fabrics and articles	46.0	42.7
Electrical machinery	44.1	53.4
Non ferrous metals	31.5	34.5

Gross domestic product

Contribution of the various sectors to GDP (basic values), in percentages

	1965	1970	1975
Agriculture	2.6	2.1	2.2
Forestry	1.9	1.8	1.6
Mining and quarrying	0.8	0.9	0.9
Manufacturing	24.6	26.3	26.6
Construction	9.9	9.5	9.5
Electricity, gas and water	1.9	2.1	2.5
Communications	6.0	5.7	6.2
Wholesale and retail trade	9.3	10.2	9.1
Banking and insurance	1.1	1.1	1.0
Letting of premises	9.6	9.1	9.0
Producers of government services	13.5	14.3	15.9
Other	22.8	16.9	15.5

Breakdown of consumer spending

Percentages of total, 1975

Food, beverages, tobacco	28.3
Housing, light, furniture	21.4
Clothing	7.2
Medical care and health expenses	3.5
Vehicles, fares, travel	14.3
Insurance services	0.9
Recreation, entertainment, education and cultural services	8.8
Other	15.6

Yearly indices (1970 = 100)

	1973	1974	1975
Industrial production	111	118	115
Wholesale prices	121	151	162
Consumer prices	122	135	149
Hourly wage rates (industry)	133	150	177

Area and population

Area: 449,964 sq. km
Population: 8,208,442 (31 December 1975)
Density of population: 20 per sq km
Capital city: Stockholm

Climate

Mean temperature and precipitation, 1931-60

Weather-station (above sea-level)	Mean temperature in C			Mean annual precipitation in mm
	January	July	Year	
Karesundo (327m)	−14.0	+13.7	−1.5	380
Stockholm (44m)	−2.9	+17.8	+6.6	555
Lund (73m)	−0.8	+17.2	+7.8	587

Breakdown of population by age and sex

Percentage, 1974

Age	Total	Male	Female
0-14	20.7	21.4	19.7
15-24	13.5	13.9	13.2
25-34	15.4	15.9	14.8
35-49	17.0	17.2	16.7
50-64	18.4	18.3	18.6
65 and over	15.0	13.3	16.9

Useful addresses in Sweden

British-Swedish Chamber of Commerce
Birger Jarlsgatan 6B S 11434 Stockholm
Tel. 08-209570 08-209572. Telex 10838 BRITCOMBS
Secretary: Frank Murray

Federation of Commercial Agents of Sweden
Western Division Burggrevgatan 24, S-41103 Gothenburg 1
Tel. 197175
(Mr. Thore Hallén)

Federation of Commercial Agents of Sweden
Narvägen 27, S-11460 Stockholm
Tel. 672430

The Federation of Swedish Wholesale, Merchants and Importers
Storgatan 19
Box 5512, 11485 Stockholm
Tel. 08-635280. Telex 1673 aludor. Tga grossistforbund

The General Export Association of Sweden
Storgatan 19
Box 5513, 11485 Stockholm
Tel. 08-630580. Telex 1620 exports. Tga export

The Federation of Swedish Industries
Storgatan 19
Box 5501, 11485 Stockholm
Tel. 08-635020. Telex 19990 swedinds

The Stockholm Chamber of Commerce
Box 16050, 10322 Stockholm
Tel. 08-231200. Tga handelskammaren

The Scania Chamber of Commerce
Slottsgatan 20
21133 Malmö
Tel. 040-71095

The Gothenburg Chamber of Commerce
Storgatan 26
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Tel. 031-134058

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E.W.L., 3 St. John's St., Goole, North Humberside. Tel. 2654 Telex 57943

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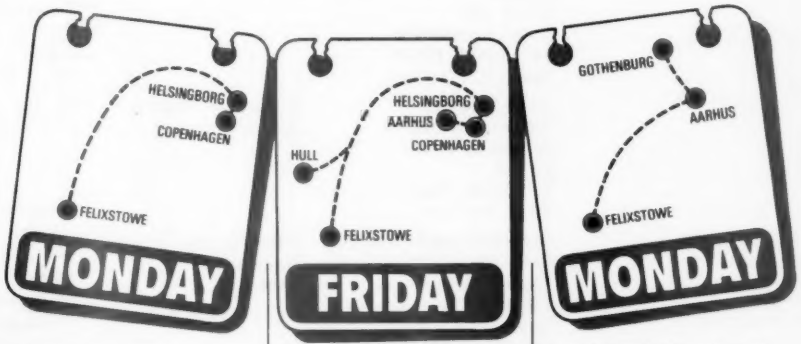
Svea Line– Three ways to Sweden



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Trelawny House, The Dock, Felixstowe, Suffolk. Tel: 039-42 5595 Telex: 98345
Traffic & Marketing Operations, No. 1 Linton Road, Barking, Essex IG11 8HH.
Tel: 01-591 4222 Telex: 897411/4.

Svea Agents for HULL only
E.W.L. Limited
The Transport Division of Ellerman Lines Ltd., P.O. Box 53, Commercial Road, Hull, 2SG. Tel: 0482 26081 Telex: 52277/8

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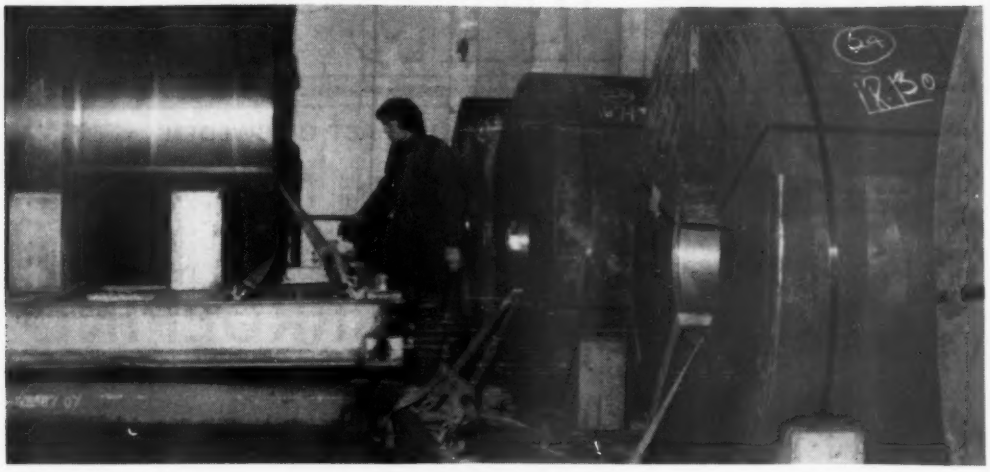
Coils of British sheet steel loaded in a Roto Line ship for export from Felixstowe to Sweden for use in the manufacture of Volvo vehicles. Volvo buy British sheet steel that is carried by Roto Line from Felixstowe to Wallhamn, a small but growing independent port set among the granite islands of Bohuslan. It is close to the Volvo works north of Gothenburg and therefore well placed for this traffic.



How to get it there...

by roll-on/roll-off ferry services

Operator	Ports used
Tor Line Ltd PO Box 40 Manby Road Grimsby DN40 3EG South Humberside Tel: 04692 73161 Telex: 527104	Felixstowe, Immingham, Gothenburg
Roto Line Ltd. Trelawny House, Felixstowe Dock Suffolk Tel: 03942 78621 Telex: 987105	Felixstowe, Wallhamn, (55km Gothenburg)
Swedish Lloyd (UK) Ltd. Berth 26 Tilbury Docks Tilbury Essex Tel: 03752 71111 Telex: 897017	Grangemouth, Tilbury, Gothenburg, Halmstad
EWL Ltd. PO Box 53 Commercial Road Hull HU1 25G Tel: 0482 26081 Telex: 52277	Hull, Gothenburg
Svea Line AB Agents in UK Brown Jenkinson and Co. Ltd. Trelawny House The Dock Felixstowe Suffolk Tel: 03942 5595	Hull, Felixstowe, Gothenburg

by road

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by conventional services

EWL Ltd. PO Box 53 Commercial Road Hull Tel: 0482 26081 Telex: 52277	Goole, Nörrkoping, Stockholm, Gefle
Berg Line Ltd. St. Johns Street Goole DN14 5QL Yorks Tel: 0405 5521 Telex: 57649	Goole, Sodertalje, Västeras, Nörrkoping
Aros Line AB 84 Oswald Road Scunthorpe DN15 7PA Tel: 0724 63171 Telex: 527049	Burton on Stather, Västeras, Oskarshamn
Mathies Line UK Agent: Anderson, Gardiner (Shipping) Ltd. Little Ships The Dock Felixstowe Tel: 03942 77964 Telex: 987771	Felixstowe, Goole, Gavle, Nörrkoping, Stockholm

by air

British Airways Cargo York House PO Box 10 Heathrow Airport Hounslow Middx. Tel: 01-759 5511 Telex: 22178	Heathrow (London), Gothenburg, Malmö (via Copenhagen), Stockholm
Scandinavian Airlines System Building 521 Cargo Centre Heathrow Airport Hounslow Middx. Tel: 01-897 1585 Telex: 935477	Heathrow (London), Gothenburg, Stockholm

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Exhibitions and Fairs

Demand extends Tokyo vintage car show

'For value for money buy a vintage car; its value increases annually and beats inflation.' This is the advice given by Peter Dodd to the Japanese motoring public as the exhibition of his classic cars closed its doors at the British Export Marketing Centre, Tokyo, on 21 July. Such was the demand that the exhibition was extended by three extra days. A record attendance of 4,430 visitors passed through the British trade centre.

'Business too was fast and furious', said a spokesman for Peter Dodd International, the Japanese subsidiary of the London-based company. Four of the exhibits were sold for a total of Yen 62.5 million. There are also several serious inquiries for the Yen 100 million 1973 Rolls-Royce Landaulette. Orders for cars available immediately in Britain amounted to Yen 133 million, with further orders to the value of Yen 104 million as soon as the cars requested can be found, 'This will only take two months', the spokesman said.

The exhibition stimulated enormous interest in both the national and trade press. Millions throughout Japan also saw televised reports of the 'Classic Car Parade' which took place in a torrential rain storm. 'The weather couldn't have been better', said Peter Dodd, 'it shows the customer that our roadworthy guarantee means what it says.'

A second exhibition is planned at the British Export Marketing Centre for November when a completely different range of classic cars will be brought to Japan.

Oppressive weather keeps down attendance at Mesucora

From Robert Hyde, Second Secretary (Commercial), British Embassy, Paris: Twenty-seven British companies took part in a joint venture sponsored by the SIRA Institute with BOTB support. at the sixth Paris Salon 'Mesure, Analyse, Contrôle, Régulation, Automatisme' (Mesucora) from 10 to 17 June. Held at the Porte de Versailles exhibition park this triennial event occupied some 20,000m² of stand space and featured the products of 900 manufacturers, more than half from overseas. The foreign contribution came from 22 countries, and was dominated by the USA, which accounted for almost 200 manufacturers, and the Federal Republic of Germany, with 120 companies represented.

Mesucora was less well attended than in the past, mainly because of the particularly oppressive weather. Those exhibitors housed in that part of the hall which lacked air conditioning were particular sufferers, and this unfortunately included the joint venture group. Nevertheless, a number of British companies obtained useful results from the salon, which covered a number of fields in which British manufacturers are well placed to provide the right product at the right price for the French market.

Joint venture at 1977 Leipzig spring fair

The UK's trading agreement with the German Democratic Republic identifies areas of industry in which both governments are anxious to develop trade, and one of the highlighted sections is engineering. This covers all aspects of production, cutting, forming, processing and relates to machinery, plant special purpose machines, tools and all types of engineering components.

With the agreement in mind, and to provide an export opportunity for British companies, Birmingham Chamber of Industry and Commerce has again accepted an invitation from the Department of Trade to sponsor a joint venture at the 1977 Leipzig International Spring Fair in the engineering production and components section.

Each year the Leipzig Fair attracts hundreds of thousands of visitors from all parts of the world and is one of the most important fairs in Europe.

Further information from A. J. Cox. Overseas Fairs Division, Birmingham Chamber of Industry and Commerce, 75 Harborne Road, Birmingham B15 3DH, tel. 021-455 9600.

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Fine fare from Britain in New York

From R. Knowles, British Trade Development Office, New York: Just a week before the bicentennial celebrations in New York the food trade came to town for the 22nd National Fancy Food and Confection Show that was held at the New York Coliseum from 27 to 30 June. Among those taking part were eight British companies in a joint venture sponsored by the British Food Export Council and the BOTB.

For the gourmet food trade in the United States 1975 was a disappointing year, but there are clear signs of a significant improvement this year; the economy is in much better shape, consumer confidence has markedly improved and retailers are much happier. Certainly the mood among retailers visiting the fancy food show was one of considerable optimism; their sales of speciality items are improving and they seemed confident that the improvement would continue and increase throughout the year.

The exhibitors in the British joint venture showed a varied selection of food stuffs and, in the case of the Metal Box Co., a colourful display of food containers. All of them reported that they had done good business and that they were encouraged by the buying mood of the numerous importers visiting the show. On other stands importers displaying British food stuffs were also doing encouraging business.

In 1977 the National Fancy Food and Confection Show will be held for the first time in New Orleans, a city celebrated for its outstanding gourmet food. Most of the British exhibitors in New York have already made their decision to take part in New Orleans and it is very much to be hoped that other British food manufacturers will join them in the joint venture. It is too good an opportunity to be missed and the size of the USA gourmet food market should make participation well worthwhile.

Industrial production show in Toronto

BOTB is supporting a UK national group at the Toronto Production Show '77 under the sponsorship of the Gauge and Tool Makers Association and the Birmingham Chamber of Industry and Commerce.

The production show is held every two years and is one of the most important exhibitions in North America for a diverse range of equipment which includes machine tools, controls and instruments, welding equipment, shop tools, pumps, valves, plant power and lighting, materials, handling systems and equipment, and pollution control systems. In 1975 the production show attracted 23,663 registered industry personnel from around the world to see over 475 exhibits which occupied an area of over 185,000 sq. ft.

Any company interested in exhibiting at the Production Show '77 with BOTB support should contact either Mr. A. R. Smith, Gauge and Tool Makers Association, 24 White Hart Street, High Wycombe, Bucks HP11 2HL, or Mr. A. J. Cox, Birmingham Chamber of Industry and Commerce, Overseas Fairs Division, 44 Calthorpe Road, Birmingham B15 1TH.

The closing date for applications is 25 October 1976.

Leisure display attracts interest in Tel Aviv

From M. Alan-Smith, Commercial Department, British Embassy, Tel Aviv: Supported by a total of 18 British firms and agents, the Design Council and the Diamond Trading Centre, took part in the Modern Living Exhibition in Tel Aviv from 22 June to 10 July. The focus of the BOTB organised British pavilion was a special display of items selected by the Design Council on the theme of leisure, which attracted much public interest and many inquiries.

The British exhibitors and their agents reported very satisfactory results from their participation, even though public attendance was considerably less than the predictions of the fairground authorities and 15 per cent less than at the last similar event in 1974.

Israeli Minister of Commerce and Industry, Haim Bar-Lev, made a point of including the British pavilion in his programme during the course of a very brief visit to the exhibition and expressed considerable interest in what he saw within it. The ministerial party was accompanied by a group of distinguished visitors from the UK, who were visiting Israel to attend the celebrations of the 25th anniversary of the Anglo/Israel Chamber of Commerce (Israel).

BOTB EXHIBITIONS GUIDE

BOTB's programme of forthcoming trade promotions will be published in next week's 'Trade and Industry'.

EXPORT YEAR

Over 500 companies are already taking part in Export Year. But there is still plenty of time to join them. Write to or phone the Export Year Office, 1 Victoria Street, London SW1 0ET. Tel. 01-215 5180/3393/5773.

BOTB news

How to succeed in Japan: one-day conference

In June UK exports to Japan were 40 per cent higher than in the same month last year. To signal this revival of interest in a market with big potential, the CBI and BOTB are jointly sponsoring, at the CBI, a one-day conference, 'How to Succeed in Japan –By Really Trying', on 22 September.

The conference will give businessmen an account of current economic developments and information about strategies of entry into the market, together with the special assistance available to exporters from BOTB.

Sir Ralph Bateman, Vice President of the CBI, will be the chairman and the guest speaker at lunch will be Sir Fred Warner, director of Guinness Peat and former British Ambassador to Japan.

Other expert speakers will include Hamish McGhie, special adviser on Japan to the British Overseas Trade Board, whose topic is 'The Billion Pound Market', Professor Geoffrey Bownas, head of the Centre of Japanese Studies, University of Sheffield, on 'Export and Investment Strategy', Reginald Cudlipp, director of the Anglo-Japanese Economic Institute on 'Learning from the Japanese', and Paul Battersby, managing director of Mediada AB, part of BOC International, who will present a case study on marketing in Japan.

Inquiries about the conference should be directed to Miss B. V. Orders, Overseas Directorate, Confederation of British Industry, 21 Tothill Street, London SW1H 9LB.

London Chamber go to Finland and Denmark

A trade mission to Finland and Denmark is being organised by the London Chamber of Commerce and Industry from 2-11 November with four working days in each country. BOTB have agreed to support the mission with a flat-rate contribution of £100 per firm.

Scandinavia has many advantages for the British exporter for example, tariff advantages under the Efta agreement.

The cut off date is 10 August. For further details of products particularly in demand, cost, etc., contact Anita Russell, London Chamber of Commerce and Industry, 69 Cannon Street, London EC4M 5AB, tel. 01-248 4444, ext. 124.

Development opportunities for exporters: free booklet

'The International Lending Agencies' is the title of a new Department of Trade booklet for manufacturers and consultants. It provides a guide to the many international lending agencies providing finance for development projects throughout the world.

Britain has only recently become a member of one of these agencies – the Inter-American Development Bank – and an article describing the resulting opportunities appeared in the 9 July 1976 issue of *Trade and Industry* (pages 102-105). British membership of the European development fund is also fairly recent. An article explaining how the fund works and what it will mean for British exporters appears on page 324.

Copies of 'The International Lending Agencies' can be obtained by sending a self-addressed, adhesive label to: Department of Trade, Projects Sub-section, Room J.33, Export House, 50 Ludgate Hill, London EC4M 7HU.

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NB

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Contact: Mr. Alabaster. Tel: 01-405 1358
THE NETHERLANDS-BRITISH CHAMBER OF COMMERCE
307 HIGH HOLBORN LONDON WC1V 7LS
Manchester office Tel: 061-834 5674

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Trade Information

ECGD insured exports up 28 per cent

'There has been a continued rapid growth in the Exports Credits Guarantee Department's business,' said Michael Meacher, Parliamentary Under-Secretary of State, Department of Trade, in Parliament on 21 July. 'Provisional results for the last financial year indicate that exports insured by ECGD totalled £8,391 million – an increase of 28 per cent over the previous year. This is, I think, a very hopeful sign of the continuing rise in exports which we can expect in the next year or so. This should thus give further confidence to both British industry and their customers overseas.

'In particular there was a big increase in exports in respect of large project business insured under the buyer credit facility where ECGD guarantees the repayment of loans by British banks to overseas buyers. In the financial year 1975-76 these exports totalled £864 million which is a 40 per cent increase on the previous year.

'And there has been a considerable increase in large project business won by UK contractors and manufacturers against stern and determined competition. This is a promising sign both for the capital goods industry and for our balance of trade.

'However, it is not only in the long term credit field where British exports are doing well. In the last financial year, the provisional figures show that short term exports insured by ECGD rose by some 23 per cent to about £6,475 million.

'This means a total increase of over 70 per cent in the last two years. And in the last 12 months ECGD has attracted over 1,400 new policyholders. This is indeed an encouraging trend.

'The provisional figures indicate that this increase in business was accompanied by a 30 per cent rise in claims paid during the last financial year to £38 million. However, although recoveries fell slightly, premium and recoveries received by ECGD totalled £70 million and ECGD continued to provide its valuable services at no net cost to public funds.'

Mr. Meacher was explaining to the Standing Committee on Statutory Instruments the purchase of the Draft Export Guarantees (Limit on Commitments) (No. 2) Order 1976, which is to increase by a further £3,000 million the limit on commitments which the Secretary of State may assume under the Export Guarantees Act 1975. He said:

'The Statutory Limit on these commitments takes the form of a monetary ceiling under which ECGD's liabilities can revolve – that is to say, as old commitments expire they make room under the ceiling for new cover to be given. I should, perhaps, confirm that what is at stake is essentially the ability of ECGD to continue to give support to our exporters. I stress that *commitments* are involved, not voted funds.

'In the earlier part of last year, the Export Guarantees Amendment Act, now incorporated in the Export Guarantees Act 1975, combined *without increase*, the previously separate limits for Section 1 and Section 2 business into a single limit of £12,200 million. It provided for that limit to be increased by up to £9,000 million by Affirmative Resolution of the House of Commons in three tranches up to £3,000 million each. With commitments increasing at about 25 per cent a year, it became necessary in November 1975 to obtain the first increase of £3,000 million thus raising the limit to £15,200 million.

'Since then there has been an unprecedented increase in ECGD's commitments. Thus from a figure of some £12,106 million at the end of 1975 they had risen by some 22 per cent in six months and by the end of June they stood at £14,776 million.

'Thus, commitments are now rapidly approaching the present limit of £15,200 million. The increase of £3,000 million to a new limit of £18,200 million is needed to enable ECGD to continue to support what I am happy to record is the rising level of exports.'

ECGD guarantee £20m line of credit for Mexican polyethylene plant

The Export Credits Guarantee Department has guaranteed a £20 million line of credit which Baring Brothers and Co. Ltd. have arranged with Petroleos Mexicanos (Pemex), Mexico. Finance for the loan was made available by a consortium of English clearing and Scottish banks.

The loan will help finance contracts placed in the UK for equipment and associated services for a polyethylene plant being built at La Cangrejera, Veracruz and for other projects which are part of the current investment programme being undertaken by Pemex.

ICI have been awarded the process contract and Sim Chem have been awarded the design and engineering contract for the polyethylene plant which will have an annual production capacity of 240,000 tonnes of polyethylene granules. Commissioning of the plant is scheduled for early 1979.

A £20 million line of credit agreement was signed in London on 19 July between Petroleos Mexicanos and Baring Brothers and Co. Ltd. Picture shows, right to left, Dr. Alfredo Naverrete, financial director of Pemex, Mr. R. D. C. McAlpine, a managing director of Baring Brothers, and Hugo B. Margain, Mexican Ambassador in London. ECGD has backed the line of credit, which is to cover UK contracts to provide equipment and services for a US$75 million polyethylene plant in the state of Veracruz and for other projects to be undertaken by Pemex under their current investment programme.

'Hints to Business Men' booklets

A revised edition of the booklet on Honduras has been published in the 'Hints to Business Men' series. British business men who intend

visiting this country on export business can obtain copies of the booklets from Export Services and Promotions Division, Department of Trade, Room DO5, Export House, 50 Ludgate Hill, London EC4M 7HU, tel. 01-248 5757, ext. 7146, or any regional office of the Departments of Trade and Industry.

Advertisements are accepted for all booklets in the series which covers over 100 countries. Inquiries about advertising should be addressed to Cheiron Press Ltd., 8/10 Parkway, London NW1 7AD, tel. 01-267 1285.

Insured parcel post service with Swaziland

The Post Office announce that as from 2 August 1976 an insured parcel post service to and from Swaziland will be available. The insured value limit will be £300.

Finnish Trade Guild extends activities

The Finnish Trade Guild in London, which has been concerned with Finnish trade activities in the UK, now proposes to cover commerce and trade in both directions. The guild has therefore amended its statutes in order to offer membership to all UK firms and organisations.

At the next in the regular series of Trade Guild bi-monthly luncheons on 15 September, Martin Berthoud, Commercial Counsellor at the British Embassy in Helsinki, will be guest speaker.

Details of the Guild may be obtained from the Finnish Trade Guild in London, c/o Finnish Paper and Board Services Ltd., Finland House Annexe, 53/54 Haymarket, London SW1Y 4RY.

Finland, with a population of 4.6 million enjoying a high standard of living, represents a good market for British goods. British exports to Finland in 1975 were worth some £265 million – a market share of 8.7 per cent.

Notices to Importers

Issued by the Department of Trade, Import Licensing Branch, Charles House, 375 Kensington High Street, London W14 8QH.

No. 1564: Imports of woven cotton textiles and cotton yarn from Brazil

Notice to Importers No. 1555, published in *Trade and Industry* on 14 May 1976, stated that a further Notice would be published about the arrangements for licensing those goods not covered by the EEC/Brazil Agreement, but which are still subject to UK restrictions. The restrictions on these goods are being phased out in accordance with Article 2 of the Gatt Multifibres Arrangement (MFA), and the quota level for the period 1 January 1976 to 31 March 1977 is set at 500,000 sq. yd. and covers the items set out below:

Tariff heading	Description
55.06	Cotton yarn, put up for retail sale
ex 55.08, ex 58.04, ex 59.13	Woven cotton fabrics
ex 61.01	Men's and boys' outer garments of woven cotton
ex 61.02	Women's, girls' and infants' outer garments of woven cotton
ex 61.03	Men's and boys' under garments of woven cotton
ex 61.04	Women's, girls' and infants' under garments of woven cotton
ex 61.05	Handkerchiefs of woven cotton
ex 61.06	Shawls, scarves, mufflers, mantillas, veils and the like, of woven cotton
ex 62.05	Other made-up textile articles of woven cotton.

Licensing arrangements

Effectively there is no additional licensing requirement, since imports of the items listed above are already subject to UK import licensing. The Brazilian authorities will continue to administer the quota as at present, by issuing export certificates to Brazilian exporters, for onward transmission to UK importers. These certificates, together with a completed Form ILB/A, should be sent to the Brazilian Embassy, Commercial Section, 15 Berkeley Street, London W1X 5AE, where the details will be checked, and the applications then passed on to Import Licensing Branch.

Note: These arrangements should also apply to those textile goods covered by Notice to Importers No. 1555, and therefore all applications for import licences for goods whether under quotas established by the EEC/Brazil Agreement, or falling within the unilateral UK restrictions, should be made via the Brazilian Embassy in London.

UK import surveillance

In addition to the textiles covered by this Notice, and Notice to Importers No. 1555, most other textiles from Brazil and other non-EEC countries are subject to UK surveillance arrangements. Descriptions of these goods and the licensing arrangements are set out in Notices to Importers Nos. 1484 and 1502.

Imports for re-export

Imports of 'restricted' cotton textiles from Brazil will not be set-off against the quotas if they are re-exported in the same state or after limited processing. The general import licensing arrangements for re-export are set out in Notice to Importers No. 1441.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 367.

No. 1565: Imports of potatoes other than seed potatoes

Notice to Importers No. 1553 extended the import licensing arrangements for new and maincrop potatoes as set out in Notice to Importers No. 1542. Licences granted under these arrangements are valid to 31 July 1976.

The general provisions of Notice to Importers No. 1542 will continue to apply after that date, and traders should note that the period of validity of licences granted under these arrangements has been further extended until 31 August 1976.

Open Individual Licences, valid until 31 July 1976 and Individual Import Licences, valid until 31 July 1976, but not exhausted by that date, should be returned by traders to Import Licensing Branch for the validity date to be extended to 31 August 1976.

The export control will be continued.

Inquiries: ILB tel. 01-603 4644 ext. 272/379.

No. 1566: Imports of textiles from Colombia – revised arrangements

The community has negotiated and initialled an agreement with Colombia on trade in textiles for the calendar years 1976 and 1977. The agreement provides for voluntary restraint to keep exports to the community of certain textile products intended for domestic consumption at agreed levels, and will apply as from 1 January 1976. Pending announcement of the community legislation to conclude the agreement its provisions are being operated de facto as set out in the following paragraphs. Should the subsequent legislation result in any change in the provisions outlined here however, a further Notice to Importers will be issued.

Scope of the agreement and quantitative levels to be applied under community arrangements

The textile items covered by the agreement and the levels to be adhered to by Colombia in respect of those exports to the United Kingdom are:

Category no.	Tariff heading	Description	Quantity 1976	Quantity 1977
1	55.09	Other woven fabrics of cotton	2,050,000 sq. m	2,193,500 sq. m
2	51.04A	Woven fabrics of man-made fibres (continuous), including woven fabrics of monofil or strip of heading no. 51.01 or 51.02: of synthetic textile fibres	300 tonnes	321 tonnes
	56.07A	Woven fabrics of man-made fibres (discontinuous or waste): of synthetic textile fibres		

In the case of Category 1, and polyester/cotton fabric within Category 2 above, there is no additional licensing requirement since imports of these textiles from Colombia are already subject to quota in the UK; the remaining goods in Category 2 were subject to surveillance licensing, but there are at present no such licences outstanding. The Colombian authorities will administer the quotas by issuing export certificates to Colombian exporters for onward transmission to UK importers. These certificates, together with a completed Form ILB/A, should be sent by the importer to Import Licensing Branch, at the address on page 333, who will issue import licences up to the appropriate overall quota limit.

Items subject to special consultation arrangements

Cotton yarn not put up for retail sale (tariff heading 55.05) which was previously subject to quota in the UK is now released from quantitative restriction, and subject only to UK surveillance licensing (see below). Should imports of this yarn reach disruptive levels however, a quota may be reimposed under the terms of the Agreement.

Handloom and textile handicraft products

Cotton handloom fabrics and products thereof originating in Colombia will not be subject to quantitative import restrictions provided that the importer obtains from Colombia a certificate in the form set out in the Annex to this Notice, issued by the Instituto Colombiano de Comercio Exterior. Suitably endorsed certificates should be sent with a completed Form ILB/A to Import Licensing Branch who will issue the necessary import licences.

Existing UK restrictions on textiles from Colombia which are not affected by the community arrangements

Provisional arrangements pending completion of the community arrangements for imports of cotton and polyester/cotton textiles from Colombia for the period 1 April 1976 to 31 March 1977 were set out in Notice to Importers No. 1549 published in *Trade and Industry* on 2 April 1976. Some of these textiles whose import into the United Kingdom is currently restrained are not however covered by the EEC/Colombia Agreement. These remaining UK restrictions are being phased out in accordance with Article 2 of the Gatt Multifibres Arrangement (MFA); the quota level for the period 1 January 1976 to 31 March 1977 is set at 880,000 sq. yd., and covers the items set out below:

Tariff heading	Description
55.06	Cotton yarn put up for retail sale
ex 55.08 / ex 59.13	Woven cotton fabric
ex 58.04	Woven pile or chenille fabric of cotton or polyester/cotton
ex 61.01	Men's and boys' outer garments of woven cotton or polyester/cotton
ex 61.02	Women's, girls' and infants' outer garments of woven cotton or polyester/cotton
ex 61.03	Men's and boys' under garments of woven cotton or polyester/cotton
ex 61.04	Women's, girls' and infants' under garments of woven cotton or polyester/cotton
ex 61.05	Handkerchiefs of woven cotton or polyester/cotton
ex 61.06	Shawls, scarves, mufflers, mantillas, veils and the like, of woven cotton or polyester/cotton
ex 62.02	Household textiles of woven cotton or polyester/cotton
ex 62.05	Other made-up textile articles of woven cotton or polyester/cotton

The Colombian authorities will continue to administer the quota, as at present, by issuing export certificates to Colombian exporters for onward transmission to UK importers. These certificates, together with a completed Form ILB/A, should be sent to Import Licensing Branch, at the address on page 333, who will issue import licences up to the overall quota limit of 880,000 sq. yd.

Imports for re-export

Imports of 'restricted' textiles from Colombia will not be set off against the quotas if they are to be re-exported in the same state or after limited processing

a outside the EEC if they are goods covered by the EEC/Colombia Agreement
b outside the UK if they are goods subject to the UK phasing-out arrangements.

The general import licensing arrangements for restricted textiles re-exported from the United Kingdom are set out in Notice to Importers No. 1441.

United Kingdom import surveillance

In addition to the textiles covered by this Notice most textiles from Colombia and other non-EEC countries are subject to UK import surveillance arrangements; descriptions of these goods and the licensing arrangements are set out in Notices to Importers Nos. 1484 and 1502.

Inquiries: Import Licensing Branch, tel. 01-603 4644 ext. 367.

ANNEX

Certificate in regard to cotton handloom fabrics and products thereof

Name and address of manufacturer;
Name and address of exporter;
Name and address of importer within the Community;
Description of goods;
Quantity (metric tons);
Name of ship or flight number;
Port or airport of destination.

This is to certify that the above shipment consists of:

i cotton handloom fabrics of the cottage industry, containing not more than 5 per cent by weight of man-made fibres, being fabrics which are both traditionally of the kind woven on handlooms and actually woven on a loom for which the motive power is provided entirely by the operators (that is where the three movements of weaving, namely shedding, picking and beating, are induced by hand or foot and no other source of power is used);
ii goods made up by the cottage industry from such cotton handloom fabrics;
iii traditional Colombian folklore handicraft textile products cut, sewn, or otherwise fabricated by hand in cottages which are units of the cottage industry.

Signed .....

Certificate of origin: issuing bodies

The following organisations have been designated by the United Kingdom Government for the purpose of issuing certificates of origin under Article 11 of the International Convention relating to the Simplification of Customs Formalities 1923:

Aberdeen Chamber of Commerce
Ayr Chamber of Commerce

Barnsley and District Chamber of Commerce
Birmingham Chamber of Industry and Commerce
Blackburn and District Chamber of Commerce
Bolton and District Chamber of Commerce
Bradford Chamber of Commerce
Bristol Chamber of Commerce and Shipping
Burnley and District Chamber of Commerce and Industry
Burton upon Trent and District Chamber of Commerce and Industry
Bury and District Chamber of Commerce

Cambridge Chamber of Commerce
Cardiff Chamber of Commerce
Carlisle Chamber of Commerce
*Chesterfield Chamber of Commerce
Colchester and District Chamber of Trade and Commerce
Coventry Chamber of Commerce
Croydon Chamber of Commerce

Derby and Derbyshire Chamber of Commerce
Doncaster Chamber of Commerce
Dorset Chamber of Commerce
Dudley and District Chamber of Commerce
Dundee Chamber of Commerce

Edinburgh Chamber of Commerce and Manufacturers
Exeter and District Chamber of Commerce

Federation of Sussex Industries and Chamber of Commerce Ltd.
Forth Valley Chamber of Commerce (Falkirk)

Glasgow Chamber of Commerce
Gloucester and County Chamber of Commerce
Goole Chamber of Commerce and Shipping
Grantham Chamber of Commerce
Great Grimsby Chamber of Commerce and Shipping
Great Yarmouth Chamber of Commerce
Greenock Chamber of Commerce and Manufactures
Guernsey Chamber of Commerce

Halifax and District Chamber of Commerce
Hertfordshire Chamber of Commerce
Hull Chamber of Commerce and Shipping

Ipswich Chamber of Commerce and Shipping
Isle of Man Chamber of Commerce (Douglas)
Isle of Wight Chamber of Commerce (Newport)

Jersey Chamber of Commerce (St. Helier)

Kendal and District Incorporated Chamber of Commerce and Manufactures
Kidderminster Chamber of Commerce (Birmingham)
Kirkcaldy and East Fife Chamber of Commerce
Kirklees Chamber of Commerce

Lancaster, Morcambe and District Chamber of Commerce (Lancaster)
Leeds Chamber of Commerce and Industry
Leicester and County Chamber of Commerce and Industry
Leith Chamber of Commerce
Lincoln Chamber of Commerce

London Chamber of Commerce and Industry (and branch issuing offices at Barking and Crawley)
Lowestoft Chamber of Commerce
Luton, Dunstable and District Chamber of Commerce (Luton)

Manchester Chamber of Commerce and Industry
Medway Chamber of Commerce
Merseyside Chamber of Commerce and Industry (Liverpool)

Neath, Briton Ferry and District Chamber of Commerce (Neath)
Newark Chamber of Commerce
*Newhaven and District Chamber of Commerce
Newport and Gwent Chamber of Commerce
North Lindsey Chamber of Commerce
North Staffordshire Chamber of Commerce and Industry
Northampton and County Chamber of Commerce
Northern Ireland Chamber of Commerce and Industry (Belfast)
Norwich Chamber of Commerce
Nottingham Chamber of Commerce and Industry

Oldham and District Chamber of Commerce
Oxford and District Chamber of Commerce

Paisley Chamber of Commerce and Industry Ltd.
Perthshire Chamber of Commerce (Perth)
Plymouth Chamber of Trade and Commerce

Port Talbot Chamber of Commerce and Shipping
Preston and District Chamber of Commerce

Reading Chamber of Commerce and Trade
Rochdale and District Chamber of Commerce
Rotherham and District Chamber of Commerce
Rugby Chamber of Commerce

Sheffield Chamber of Commerce and Manufactures
Slough and District Chamber of Commerce and Industry (branch issuing offices also at London Airport (Heathrow) and High Wycombe)
South of Scotland Chamber of Commerce (Hawick)
Southampton Chamber of Commerce
South East Hampshire Chamber of Commerce and Industry
Southend Chamber of Trade, Commerce and Industry
Stockport Chamber of Commerce
Swansea Chamber of Commerce and Shipping
Swindon Chamber of Commerce

Telford Chamber of Industry and Commerce Ltd.
Teesside and District Chamber of Commerce
Royal Tunbridge Wells Chamber of Trade
Tyne and Wear Chamber of Commerce (Newcastle upon Tyne)

Wakefield District Chamber of Commerce and Industry
Walsall Chamber of Commerce and Industry
Warrington Chamber of Commerce
City of Westminster Chamber of Commerce
*Widnes Chamber of Commerce
*Wigan and District Chamber of Commerce
Wirral Chamber of Commerce
Wolverhampton Chamber of Commerce and Industry
Worcester Chamber of Commerce

*Does not certify movement certificates

The list previously published, in *Trade and Industry* of 30 January 1976, is hereby cancelled.

Information for exporters

Exporters are informed that foreign Customs authorities may refuse certificates of origin other than those issued by organisations designated by the Department of Trade and listed above. Exporters are advised that difficulties may also arise over documents which do no more than authenticate the signature of the declarer (even if the signature of the declarer is later officially authenticated).

Refusal by foreign Customs authorities to accept certificates of origin or difficulties arising, for the reasons given above, are almost bound to lead to delay in delivery of the goods concerned, and may in certain circumstances lead to forfeiture of the goods, or in the imposition of financial penalties, or both.

Chambers of Commerce seeking designation to issue certificates of origin universally acceptable to foreign Customs authorities under the provisions of international Conventions should apply in the first instance to the Association of British Chambers of Commerce, 6-14 Dean Farrar Street, London SW1H 0DX, as the ABCC acts as an advisory body to the Department of Trade on these matters.

Tariff and Trade Notices

France

Live sheep for fattening: import quota. The French *Official Journal*, 29 June 1976, announced that an import quota has been opened for live sheep (tariff item no. 01-04 A I ex b) intended for fattening, and which originate in and are consigned from countries other than the original members of the EEC. Import licences will be issued only to importers who can show that they have been importing sheep for fattening for the past five years. These licences will be valid until 15 May 1977. Inquiries: OTAR 01-248 5757 ext. 423/7174/408/482.

Prohibition on the use of certain foodstuffs colourants. It has been announced in the French press that the use of the following colours in foodstuffs will be banned, as from 1 October 1976:

EEC no.	Common name
E 103	Chrysoine S
E 105	Fast Yellow AB
E 111	Orange GGN
E 121	Orchil, orcein
E 125	Scarlet GN
E 126	Ponceau 6R
E 130	Anthraquione blue (solanthrene blue RS)
E 152	Black 7984
E 181	Burnt umber

This prohibition implements an EEC Council Directive, no. 76/399 of 6 April 1976, which was published in the *Official Journal of the European Communities* L108 of 26 April 1976, and was referred to in *Trade and Industry* of 14 May 1976 (p. 134).

It is expected that foods, manufactured before 1 October 1976, which contain any of the above colours, can continue to be sold until 1 January 1978.

It was also announced that the use of the following colour:

EEC no.	Common name
E 123	Amaranth

will be prohibited for use in foodstuffs (with the exception of caviar and caviar substitutes) as from 1 October. It is expected that products (other than caviar, etc.) which contain amaranth, if manufactured before 1 October, can continue to be sold until 1 January 1977.

An official *arrêté*, prohibiting the use of the nine colours listed in the Council Directive, and also restricting the use of amaranth to caviar, etc., is likely to be published shortly.

Inquiries: OTAR 01-248 5757 ext. 423/7174/408/482.

Italy

Extension of 1 per cent VAT on fertilisers. The Italian *Gazetta Ufficiale* 175, 6 July 1976 published decree law 452, 3 July 1976, announcing with effect from 1 July 1976 an extension on the 1 per cent VAT reduced rate on fertilisers until 30 June 1977. Copies of the decree law in Italian are available.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Manufacture and the retail of beer. Decree law 454 in the *Gazetta Ufficiale*, 6 July 1976, sets out amendments to Law 329/74 governing the production of beer for retail sale. The decree law abolishes the issuing fee and the annual government concession tax of 10,000 lire on the import and sale of foreign beer. The decree law came into force on 7 July 1976. Copies of the decree law in Italian are available.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Metrology. The *Gazetta Ufficiale* of 6 July 1976, published a decree law, of 3 July 1976, implementing EEC Council Directive 75/106, relating to the making up by volume of certain prepackaged liquids, and Council Directive 75/107, relating to bottles used as measuring containers.

The decree law deals with marking requirements for prepackages for certain liquid products, with acceptable tolerances, and lays down procedures for testing of bottles and prepackages.

Copies of the decree law, in Italian are available.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Extension of exchange deposit scheme. The Italian 50 per cent exchange deposit scheme introduced on 5 May 1976 (see *Trade and Industry*, 14 May 1976, page 443), which was due to expire on 3 August, has been extended for a further three months to 3 November. No further details are available at present. Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Economic measures. The following correction should be made to the notice in *Trade and Industry*, 2 July 1976, page 39, on changes in value added tax:

c Goods now subject to 12 per cent Vat, previously 6 per cent: Fortified wines and liqueurs, and wine of fresh grapes containing more than 21 per cent in volume of alcohol, other wines of fresh grapes containing less than 21 per cent in volume of alcohol are at 6 per cent Vat.

Inquiries: OTAR 01-248 5757 ext. 466/467/288.

Spain

Natural gas. The Spanish *State Gazette*, 18 June 1976 published Royal Decree 1350/1976 of the Ministry of Industry classifying the production, storage, transport, distribution, and consumption of natural gas as an area of preferential interest. The decree said that natural gas consumption represents 1.5 per cent of Spain's primary energy consumption and this percentage will probably increase to 11 per cent by 1985. Benefits granted by the decree include:

1 Compulsory expropriation of land required by new companies or new projects.
2 Up to 95 per cent reduction in the import duties and taxes to be paid on the importation of machinery and equipment needed by the new companies or projects, and which are not manufactured in Spain.
3 Freedom to amortise the value of the new installations within a period of five years.

Companies willing to benefit from the above will have to submit details of their projects to the Ministry of Industry. In the case of new companies their investments in fixed assets will have to be at least

CRE Commercial Relations and Exports Divisions
Department of Trade
1 Victoria Street, London SW1H 0ET
Tel. Direct dialling (see end of each notice)

OTAR Overseas Tariffs and Regulations Section
Export Data Branch
Export Services and Promotions Division
Department of Trade
Export House, 50 Ludgate Hill, London EC4M 7HU
Tel. 01-248 5757 (extension at end of each notice)

250 million pesetas. Companies already operating in this field will also benefit from the above when the value of their installations, expansions, or projects reach the amount of at least 100 million pesetas in fixed assets. A translation of the original text is available.

Inquiries: OTAR 01-248 5757 ext. 462/471/472/473.

Global quotas. The Spanish *State Gazette* of 16 July 1976 published 10 resolutions of the Ministry of Commerce, calling the second half of the following global quotas:

Quota no.	Goods	Tariff no.	Value in pesetas for the six-month period June–December 1976
26	Surface-active preparations and other chemical products	34.02.B, 34.03.B, ex 38.07, ex 38.08, 38.19.F.2, ex 38.19.G, 38.19.H, 38.19.J, ex 38.19.K	109,513,412
27	Phenoplasts and furan resins	39.01.A	48,400,000
28	Aminoplasts	39.01.B	32,670,000
29	Other condensation, polycondensation and polyaddition products	39.01.C, ex 39.01.K	32,153,832
30	Styrene and derivative products (polymerisation)	39.02.C	16,637,500
31	PVC	39.02.E	32,670,000
32	Other polymerisation and copolymerisation products	39.02.A.2, 39.02.G.2, 39.02.G.3, 39.02.L.2, ex 39.02.M.1, 39.02.M.2, 39.02.N ex 39.03.A	58,954,192
33	Manufactures of plastic products	39.07.B	48,400,000
34	Non-liberalised wood manufactures	44.15, 44.16, 44.18, 48.09	14,468,558
35	Silk fabrics	50.09, 50.10	33,275,000

Period for submitting applications: 30 days from 16 July 1976.

Global quotas. The Spanish *State Gazette*, 15 July 1976, published ten resolutions of the Ministry of Commerce, calling the second half of the following global quotas:

Quota no.	Goods	Tariff no.	Value in pesetas for the six-month period June–December 1976
9	Industrial fatty alcohols	15.10.C	43,257,500
10	Glucose and lactose, chemically free	17.02.A.1, 17.02.B.1	43,257,500
15	Inorganic chemical products	28.02, 28.14.A, 28.15.B, 28.41.B.3, ex 28.46.B	10,332,220
17	Vegetable alkaloids	29.42.A, 29.42.C	60,500
18	Organic chemical products	ex 29.25.I, 29.44.A, 29.44.B	10,450,000
21	Varnishes, dyes, pigments and similar preparations	32.09.A, ex 32.09.D	36,780,753
22	Perfumery, toilet, cosmetic preparations	33.06, 34.01.B	21,780,000
23	Dextrins and dextrin glues; soluble or roasted starches, starch glues	35.05	3,025,000
24	Powder, pyrotechnic articles and matches	29.03.B.2, 36.01, 36.02, 36.03, ex 36.04, 36.05, 36.06	13,750,000
25	Photographic material	37.04.A, 37.05.B	3,327,500

Period for submitting applications: 30 days from 15 July 1976.

Good sales for Twinings tea in Poland

Final markings for a consignment of Twinings English Breakfast tea destined for Warsaw, Poland, being stencilled on to the cardboard boxes. These cartons form part of a £30,000 order for Poland, which left Twinings' Andover factory last week. The order came as a direct result of a very successful presentation given in Warsaw by Brynley J. Evans, managing director of R. Twining and Co. Ltd. and Sam Twining, the company's export director, on Twinings speciality teas, and their blending processes. Commenting on the visit Brynley Evans said: 'In the last 12 months our exports to Poland amounted to just over £200,000 and we are hoping this figure will exceed £300,000 this year.'

Global quotas. The Spanish *State Gazette* of 17 July 1976 published 11 resolutions of the Ministry of Commerce, calling the second half of the following global quotas:

Technical, Chemical, Electronics, Engineering, Medical, Legal and Commercial Translations

- FRENCH
- GERMAN
- SPANISH
- ITALIAN
- PORTUGUESE
- JAPANESE
- GREEK
- ARABIC
- RUSSIAN
- DUTCH
- SWEDISH
- FINNISH

etc., etc.

ALL LANGUAGES TRANSLATED

CEDAR TRANSLATION AGENCY

52 SHAFTESBURY AVENUE, LONDON, W.1 Tel: 01-734 8862

Birmingham Office: TEMPLE HOUSE, 43-48 NEW STREET, BIRMINGHAM B2 4LH Tel: 021-643 4577

Manchester Office: 39 GEORGE STREET, MANCHESTER M1 4HQ Tel: 061-236 2321

Head Office: 27 MONTAYNE ROAD, WALTHAM CROSS, HERTS Tel: Waltham Cross (0992) 39822 and 25541

TECHNICAL SPECIFICATIONS
INSTRUCTION MANUALS
LEGAL DOCUMENTS
CORRESPONDENCE · PATENTS, ETC.

ENCIRCLE TI 140 ON PAGE 358 FOR FURTHER INFORMATION

Quota number	Goods	Tariff number	Value in pesetas for the six month period June-December 1976
36	Cotton yarns and other yarns	55.05, 55.06, 57.06, 57.07.C	62,871,748
37	Fabrics of various fibres	55.07, 55.08, 55.09, 57.10, ex 57.11	41,,250,000
38	Carpets and rugs	58.01, 58.02, 58.03	7,865,000
39	Tulle, lace, velvet and knitted fabrics	58.04.E, 58.08, 58.09, 60.01.C	18,634,000
40	Special fabrics	ex 59.03.A, 59.07, 59.08, ex 59.11, ex 59.12, ex 59.13, 60.06.A.1, 60.06.B.1	16,637,500
41	Other textile manufactures	58.05.D, 58.06, 58.07.A.1, 58.07.B.1, 58.07.C.1, 58.07.D.1, 59.01, 59.02.C, ex 59.04.B, ex 59.05.C, ex 59.06, ex 59.14, ex 59.15	13,915,000
42	Knitted goods	ex 60.02, 60.03.A.2, 60.03.B.2, 60.03.C.1, 60.04.C, 60.05.C	1,996,500
43	Outer garments	61.01.A, ex 61.01.D, ex 61.01.E, 61.02.A, ex 61.02.D, ex 61.02.E	10,450,000
44	Under garments	61.03.A, ex 61.03.D, 61.04.A, ex 61.04.D	1,815,000
45	Other garments and fabric accessories	61.05, 61.07, 61.09, 61.10.A, ex 61.10.D, 61.11.A	5,142,500
46	Other made-up textile articles	62.01.B.1, 62.02.A, 62.03, ex 62.04, ex 62.05.B	5,324,000

Period for submitting applications: 30 days from 17 July 1976.

Inquiries: OTAR 01-248 5757 ext. 462/471/472/473.

Capital goods – additives and amended descriptions. *Trade and Industry*, 16 July 1976 published Item No. 7 under Extensions, as 84.19 – E. This should have been 85.19 – E.

Portugal

Importation and use of Polychlorinated Diphenyls (PCB's). *Diario da Republica* No. 118 of 20 May 1976 published Decree-Law 378/76 on the conditions for use of polychlorinated diphenyls.

From 1 July 1976 the use of PCBs is prohibited for industrial or commercial purposes, except in the case of dielectric fluids for high voltage transformers and condensers; heat transmission fluids (other than those used in foodstuffs and feedstuffs manufacturing, selling or treatment premises); hydraulic fluids in mining equipment; low powered condensers; catalysts. Manufactured products containing PCBs in unauthorised applications may no longer be imported.

Inquiries to OTAR section, 01-248 5757 ext. 458/461.

Greece

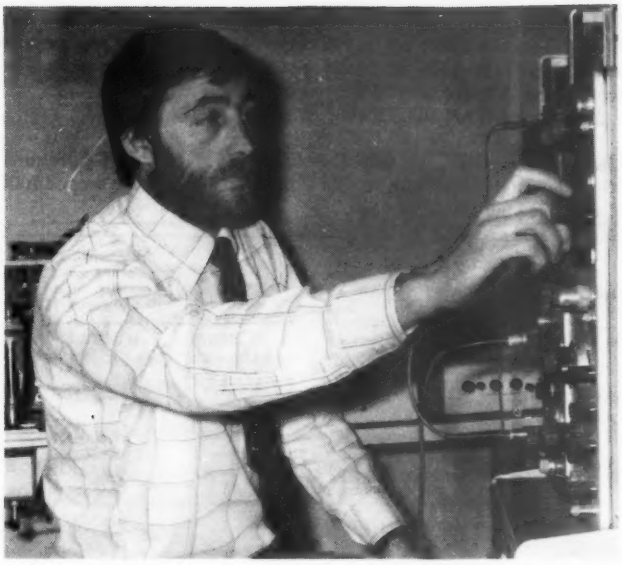
Import licensing. A Greek Ministry of Commerce decision of 2 July 1976 lists the following items which have been included on Import List 'A' and which may be imported only after approval of the Foreign Trade Council:

Tariff no.	Description
ex 11.02 D	Edible maize germ, whole or ground
ex 12.01 B, C, I and L-P	Cotton seed, sunflower seeds, niger, colza and similar seeds, soya beans, ground nuts whether or not in the shell, palm nuts and kernels, rush-nuts, copra and other oil seeds

Import of phenoplasts. The Greek press of 19 May 1976 reported a decision of the Athens Chamber of Commerce and Industry that phenoplasts, tariff heading 39.01, may now only be imported from EEC countries.

Inquiries: OTAR 01-248 5757 ext. 439.

CRE tel. Direct dialling **OTAR** telephone 01-248 5757
Extensions to **OTAR** numbers are given at the end of each notice



Britain is to provide the seismological apparatus for an urgently needed earthquake early warning system in Turkey in an effort to avoid a similar tragedy to that of the Lice earthquake, when 2,385 lives were lost and thousands more left homeless. Kandilli Observatory on the Sea of Marmara will be the operational centre. Later this year Alistair Miller, pictured in his laboratory at the Global Seismological Unit in Edinburgh, will lead a team to Turkey to carry out the installation and oversee the initial running of the equipment in collaboration with the local staff at Kandilli. The Sea of Marmara lies in the Northern Anatolian Fault, a seismologically active zone, which is about 1,000km from Lice.

Israel

Registration, testing and marking of medical preparations. The Israeli authorities have issued new regulations on the registration, testing and marking of medical preparations, with which imported goods must comply. A copy of the regulations is available.

Inquiries: OTAR 01-248 5757 ext. 458/461.

Mauretania

Customs tariff amendments. The Mauretanian Ways and Means Bill for 1976 gives details of the products for which preferential treatment will be accorded on imports originating in the nine member states of the EEC.

The following items are exempt from Customs Duty:
All products in Chapters 1-21 inclusive; hydraulic cements (25.03); common wood (ex 44.05); cotton cambric (ex 55.09); concrete reinforcing bars (ex 73.10); stoves for domestic and travel purposes, of iron (ex 73.36) of aluminium (ex 76.15) or of copper (ex 74.17) outboard motors for fishing purposes (ex 84.06); compression type refrigerating equipment where the power of the compressor is not less than 10 hp (ex 84.15); machinery for bookbinding (84.32); typesetting and printing (84.34/35); electrical line telephonic and telegraphic apparatus (85.13); transmitters and transmitter-receivers for radio-telegraphy, radio-broadcasting and television (ex 85.15); television cameras (ex 85.15); tractors (87.01); trucks and lorries of various types (ex 87.02); motor-vehicle chassis with drivers' cabs of a loading capacity of or exceeding 10 tonnes (ex 87.02); trailers for the transport of goods, of a loading capacity of or exceeding 10 tonnes (ex 87.14).

The minimum rate of customs duty is levied on all other goods.

Inquiries: OTAR 01-248 5757 ext. 472/471/473/462.

Gambia

Weights and measures. The Standards of Weights and Measures Act, 1976, was published in the *Gambia Gazette* of 25 May 1976. The object of the Bill is to introduce the Metric System of Weights and Measures and shall come into operation on such date or dates as the Minister may by order appoint. Inquiries: OTAR 01-248 5757 ext. 473.

South Africa

Customs tariff changes. The following amendments were published in the South African *Government Gazette*, 9 July 1976:

R.1173 B.N. 85.18. Sub-heading No. 85.18.10 is restated and the rates of duty on certain fixed capacitors are amended.

R.1174 B.N. 69.08. Specific provision, at a rate of duty of 20 per cent or 215c per m^2 less 80 per cent of the fob price, is made for glazed white ceramic wall tiles (excluding mosaics). The rate of duty on other glazed ceramic wall tiles (excluding mosaics) is amended from 20 per cent to 20 per cent or 295c per m^2 less 80 per cent of the fob price.

R.1175 B.N. 70.14 and 84.15. The rate of duty on oil lamps, lamp chimneys and lampshades for oil lamps is reduced from 5 per cent to 2.5 per cent and specific provision at a rate of duty of 20 per cent is made for certain evaporators and condensers (with or without fans), for refrigerators and refrigerating equipment.

INDUSTRIAL REBATES

R.1176 B.N. 32.09. Provision is made for a rebate of the full duty on solutions of polyurethane, unpigmented, for the manufacture of colour, paint, varnish and allied products.

GENERAL REBATES

R.1177 Item 410.03. B.N. 30.03. Provision is made for a rebate of the full duty on stock remedies containing 2.6-dihydroxy-benzoic acid-4-bromanilide as active ingredient.

R.1178 Item 460.13. B.N. 69.08. The provision for a rebate of duty on glazed white ceramic wall tiles (excluding mosaic cubes) is withdrawn.

Tariff application. Customs Tariff Application List 23/76, published in the South African *Government Gazette*, 23 July 1976, contains an application to the Board of Trade and Industries for increase in duty on:

1 pistons classifiable under tariff subheadings 84.06.83.30 and 84.06.83.90 and

2 twine, cordage, ropes and cables classifiable under tariff subheading 59.04.50.10.

British trade organisations thought to be interested in the application are being informed. Any British firm affected which wishes to make representations to the South African Board of Trade and Industries and belongs to a trade organisation should, therefore, first contact its own trade association.

If any firm proposes to make independent representations to the South African authorities and requires further information concerning the application, it should address inquiries to CRE: tel. 01-215 5274.

Import deposit scheme. It was announced on 21 July, in a joint statement by the Ministers of Finance and Economic Affairs, that a temporary import deposit scheme is to be introduced with effect from 2 August. Importers will be required to place a cash deposit with the Controller of Customs and Excise at the time of entry of goods of 20 per cent of the fob price (calculated to the nearest Rand), the sum being repayable, without interest, after six months. Goods will be refused entry if deposits are not paid.

Defence equipment and certain other imports by the State will be exempt from the scheme as well as mineral fuels and oils and capital goods (to a value of over R10,000) essential for certain development projects.

Further details will be published as soon as they become available. Inquiries: OTAR 01-248 5757 ext. 471/472/473/462.

The TDF.30 heavy duty fixed disc plough which was launched to the public at the 1976 Royal Show in July by Ransomes Sims and Jefferies. Ransomes say that in some overseas territories the penetration of tractors of over 100 h.p. has now reached 30 per cent of total tractor sales and these tractors are being called on to work in the more rugged farming conditions prevailing in developing countries. With this in mind Ransomes have spent five years developing and testing a large fixed disc plough to suit wheeled tractors of 90 h.p. to 120 h.p. The result is the TDF.30 disc plough which will complement the TD.17 and TD.23 series of disc ploughs which are at work throughout the world. The TDF.30 was extensively tested in Africa and the Far East and a measure of the confidence Ransomes dealers have in the new disc plough is indicated by orders already received from many countries in Central America, Africa and the Far East. Full scale production of the TDF.30 starts in October 1976 for overseas delivery only.

Pakistan

The Seed Act 1976. The Seed Act 1976 received assent on 11 May 1976 and provides for controlling and regulating the quality of seeds of various varieties of crops.

One of the provisions of the act is that the Pakistan Federal Government shall establish a National Seed Council for the performance of certain functions entrusted to it under this act, one of which is to advise on the import of seeds.

A loan copy of the act is available. Inquiries: OTAR tel. 01-248 5757 ext. 420/475/7062.

Singapore

Customs duties exemptions. The Singapore *Government Gazette* has published the Customs Duties (Amendment No. 5) Order, 1976, which came into force on 25 June 1976 and announced the following changes to the Customs Tariff:

The Schedule to the Customs Duties Order, 1974, is hereby amended by inserting:

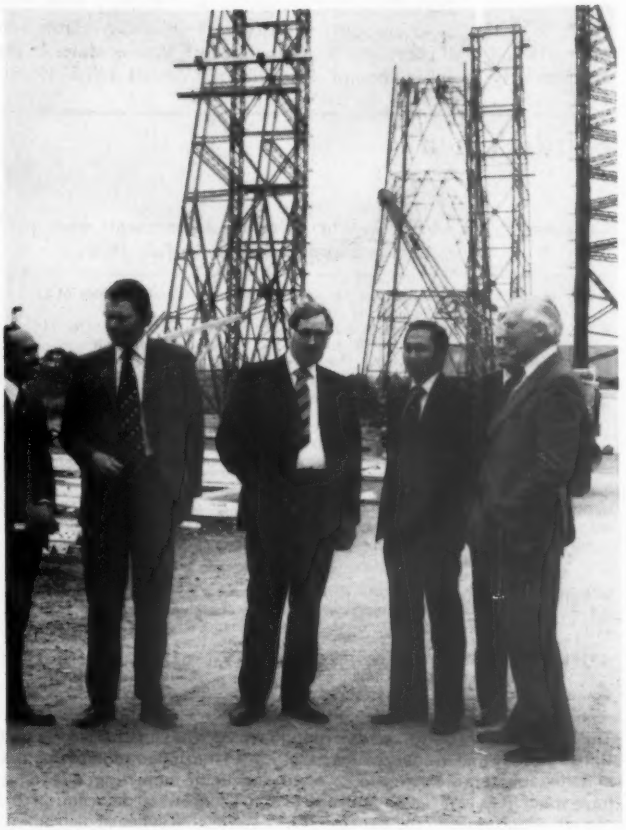
	Unit of quantity	Customs duty Full	Pref.	Excise
(a) after the Heading 17.04 000 the following sub-heading:				
000–1 Medicated sugar confectionery	kg	Nil	Nil	Nil
(b) after the Heading 33.06 600 the following sub-heading:				
600–1 Air fresheners and room deodorisers, whether or not perfumed, containing 99 per cent para-dichlorobenzene	value	Nil	Nil	Nil
(c) after the Heading 42.03 900 the following sub-heading:				
900–1 Watch straps	doz.	Nil	Nil	Nil
(d) after the Headings 84.12 830, 84.12 840, 84.12 850 and 84.12 860 the following sub-headings in their respective order:				
830–1 not in ready-to-assemble packs but in completely knocked down form acceptable to the Comptroller	No.	Nil	Nil	Nil
830–2 fan coil, using chilled water, multi-unit	No.	Nil	Nil	Nil
840–1 not in ready-to-assemble packs but in completely knocked down form acceptable to the Comptroller	No.	Nil	Nil	Nil
840–2 fan coil, using chilled water, multi-unit types	No.	Nil	Nil	Nil
850–1 not in ready-to-assemble packs but in completely knocked down form acceptable to the Comptroller	No.	Nil	Nil	Nil
850–2 fan coil using chilled water, multi-unit types	No.	Nil	Nil	Nil
860–1 not in ready-to-assemble packs but in completely knocked down form acceptable to the Comptroller	No.	Nil	Nil	Nil
860–2 fan coil, using chilled water, multi-unit types	No.	Nil	Nil	Nil
(e) after the Headings 84.15 311, 84.15 312 and 84.15 313 the following sub-headings in their respective order:				
311–1 not in ready-to-assemble packs but in completely knocked down form acceptable to the Comptroller	No.	Nil	Nil	Nil
312–1 not in ready-to-assemble packs but in completely knocked down form acceptable to the Comptroller	No.	Nil	Nil	Nil
313–1 not in ready-to-assemble packs but in completely knocked down form acceptable to the Comptroller	No.	Nil	Nil	Nil
(f) after the Heading 85.04 920 the following sub-heading:				
920–1 Plates of cadmium nickel	value	Nil	Nil	Nil
(g) after the Heading 85.15 110 the following sub-heading:				
–3 with screens exceeding 25.4cm not in ready-to-assemble packs but in completely knocked down form acceptable to the Comptroller	No.	Nil	Nil	Nil
(h) after the Heading 87.04 200 the following sub-heading:				
200–1 for motor buses and goods motor vehicles completely knocked down	No.	Nil	Nil	Nil
(i) after the Heading 87.05 200 the following sub-heading:				
200–1 for motor buses and goods motor vehicles completely knocked down	No.	Nil	Nil	Nil
(j) after the Heading 87.14 210 the following sub-heading:				
210–1 semi-trailers (articulated) for road tractors completely knocked down	No.	Nil	Nil	Nil
(k) after the Heading 94.03 100 the following sub-heading:				
100–1 paper pockets for filing cabinets	value	Nil	Nil	Nil

Do you use statistics?

The Government Statistical Service (GSS) prepares a wide range of reliable and detailed figures on the United Kingdom. It is usually worth checking to see if what you want is available from them. You can see many government statistical publications at your local public library, buy them from HMSO or refer to the comprehensive collection held at the Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4N 7HU (tel. 01-248 5757 ext. 368).

A free pamphlet, *Government Statistics – a brief guide to sources*, gives up-to-date contact points in Departments for further information. You can obtain copies from regional offices of the Department of Industry or by writing to the Central Statistical Office Press and Information Service, Great George Street, London SW1P 3AQ.

Bridge replacement in Indonesia



Indonesian Ambassador Ricardus Subono (left) talking to Colin Shepherd, MP for Hereford (South), during a visit to the Painter Brothers Division of Balfour Beatty Power Construction Ltd. at Hereford. With them (extreme right) is Denis Rooney, chairman and managing director of Balfour Beatty. Painter Brothers are currently involved in the fabrication and protective coating of 137 Callender Hamilton bridges as part of a massive bridge replacement programme being undertaken by the Highways Department of the Indonesian Government.

Inquiries: OTAR 01-248 5757 ext. 401/468/469.

Japan

Liquor tax: liqueurs. Following the reference in *Trade and Industry* of 30 April, page 292, the Japan *Official Gazette* has announced the following changes in the ad valorem tax thresholds for certain liqueurs:

1 Under the heading 'Liqueurs' (ii) Other 'If sparkling' delete 1,200 and insert 1,330; delete 1,080 and insert 1.200.

2 Under the heading 'If not Sparkling' delete 960 and 840 and insert 1,070 and 930 respectively.

The change came into effect on 1 July. Inquiries: OTAR 01-248 5757 ext. 420/7062.

Australia

Textiles and apparel: tariff changes following imposition of quotas. Details of a major review of the tariff quota arrangements applying to the textiles and apparel industry were given in *Trade and Industry*, 25 June 1976, page 788. The tariff changes pertaining to these arrangements, which came into force on 1 July, are as follows:

Tariff no.	Goods	Rates of duty: General	Rates of duty: Preferential
1 Omit sub-item 60.04.2, substitute the following sub-item:			
60.04.2	Sleepwear	43%; or, if higher, $1.43 per doz	17%
2 Omit sub-item 60.04.5, substitute the following sub-items:			
60.04.5	Women's and girls' shirts having a chest measurement of less than 80 centimetres:		
60.04.51	Wholly or partly of wool, wholly or partly of silk or wholly or partly of man-made fibres:		
60.04.511	As prescribed by by-law	36%; or, if higher 21%, and $0.26 each	21%; or, if higher, 9%, and $0.11 each
60.04.519	Other	36%, and $6 per kg; or, if higher, 21%, and $0.26 each, and $6 per kg	21%, and $6 per kg; or, if higher, 9%, and $0.11 each, and $6 per kg
60.04.59	Other:		
60.04.591	As prescribed by by-law	36%; or, if higher, 21%, and $0.131 each	21%; or, if higher, 9%, and $0.056 each
60.04.599	Other	36%, and $6 per kg; or, if higher, 21%, and $0.131 each, and $6 per kg	21%, and $6 per kg; or, if higher, 9%, and $0.056 each, and $6 per kg
60.04.6	Women's and girls' shirts having a chest measurement of not less than 80 centimetres:		
60.04.61	Wholly or partly of wool, wholly or partly of silk or wholly or partly of man-made fibres:		
60.04.611	As prescribed by by-law	36%; or, if higher, 21%, and $0.26 each	21%; or, if higher, 9%, and $0.11 each
60.04.619	Other	36%, and $12 per kg; or, if higher, 21%, and $0.26 each, and $12 per kg	21%, and $12 per kg; or, if higher, 9%, and $0.11 each, and $12 per kg
60.04.69	Other:		
60.04.691	As prescribed by by-law	36%; or, if higher, 21%, and $0.131 each	21%; or, if higher, 9%, and $0.056 each
60.04.699	Other	36%, and $12 per kg; or, if higher, 21%, and $0.131 each, and $12 per kg	21%, and $12 per kg; or, if higher, 9%, and $0.056 each, and $12 per kg
60.04.7	Other undergarments:		
60.04.71	Wholly or partly of wool, wholly or partly of silk or wholly or partly of man-made fibres	36%; or, if higher, 21%, and $0.26 each	21%; or, if higher, 9%, and $0.11 each
60.04.79	Other	36%; or, if higher, 21%, and $0.131 each	21%; or, if higher, 9%, and $0.056 each
3 Omit paragraph 60.05.13, substitute the following paragraph:			
60.05.13	Men's and boys' trousers (including shorts):		
60.05.131	Shorts	34%, and $8 each	21%, and $8 each
60.05.132	Trousers having a waist measurement of less than 78 centimetres, not being goods falling within sub-paragraph 60.05.131	34%, and $5 each	21%, and $5 each
60.05.139	Other	34%, and $10 each	21%, and $10 each.
4 Omit paragraphs 60.05.15 and 60.05.16, substitute the following paragraphs:			
60.05.15	Dressing gowns, kimonos, bathgowns and the like:		
60.05.151	Having a chest measurement of less than 80 centimetres	34%, and $5 each	21%, and $5 each
60.05.159	Other	34%, and $10 each	21%, and $10 each
60.05.16	Coats (other than of textile fabric coated, covered or laminated with artificial plastic material resembling leather), jumpers, cardigans, sweaters and the like:		
60.05.161	Having a chest measurement of less than 80 centimetres	34%, and $10 per kg	21%, and $10 per kg
60.05.169	Other	34%, and $20 per kg	21%, and $20 per kg
60.05.17	Dresses:		
60.05.171	Having a chest measurement of less than 80 centimetres	34%, and $7 per kg	21%, and $7 per kg
60.05.179	Other	34%, and $14 per kg	21%, and $14 per kg
60.05.18	Garments, not being goods falling within a preceding paragraph of this sub-item, as follows: a shirts (so called) and blouses; b tracksuits, playsuits, rompersuits and the like having a chest measurement of not less than 86 centimetres; c other garments for women, girls or infants, not being tracksuits, playsuits, rompersuits or the like:		
60.05.181	Shirts (so called) and blouses, having a chest measurement of less than 80 centimetres	34%, and $6 per kg	21%, and $6 per kg
60.05.189	Other	34%, and $12 per kg	21%, and $12 per kg
5 Omit paragraph 61.01,69, substitute the following paragraph:			
61.01.69	Other:		
61.01.691	As prescribed by by-law	43%; or, if higher, 30%, and $0.64 each	17%; or, if higher, 9%, and $0.26 each
61.01.692	Having a waist measurement of less than 78 centimetres	43%, and $5 each; or, if higher, 30%, and $5.64 each	17%, and $5 each; or, if higher, 9%, and $5.26 each
61.01.699	Other	43%, and $10 each; or, if higher, 30%, and $10.64 each	17%, and $10 each; or, if higher, 9%, and $10.26 each
6 Omit sub-item 61.01.7, substitute the following sub-item:			
61.01.7	Dressing gowns, kimonos, bathgowns and the like:		
61.01.71	As prescribed by by-law	47%; or, if higher, $0.319 each	21%
61.01.72	Having a chest measurement of less than 80 centimetres	47%, and $5 each; or, if higher, $5.319 each	21%, and $5 each
61.01.79	Other	47%, and $10 each or, if higher, $10.319 each	21%, and $10 each
7 Omit sub-items 61.02.1 and 61.02.2, substitute the following sub-items:			
61.02.1	Dresses:		
61.02.11	Dresses for infants in arms or dresses 56 centimetres or less in length:		
61.02.111	As prescribed by by-law	39%	17%
61.02.119	Other	39%, and $7 per kg	17%, and $7 per kg
61.02.12	Wholly or partly of wool, not being goods falling within paragraph 61.02.11:		

Tariff no.	Goods	Rates of duty	
		General	Preferential
61.02.121	As prescribed by by-law	34%; or, if higher, 21%, and $0.94 each	21%; or, if higher, 9%, and $0.56 each
61.02.122	Having a chest measurement of less than 80 centimetres	34%, and $7 per kg; or, if higher, 21%, and $0.94 each, and $7 per kg	21%, and $7 per kg; or, if higher, 9%, and $0.56 each, and $7 per kg
61.02.129	Other	34%, and $14 per kg; or, if higher, 21%, and $0.94 each, and $14 per kg	21%, and $14 per kg; or, if higher, 9%, and $0.56 each, and $14 per kg
61.02.13	Wholly or partly of silk, or wholly or partly of man-made fibres, but not containing wool, not being goods falling within paragraph 61.02.11:		
61.02.131	As prescribed by by-law	36%; or, if higher, 21%, and $0.75 each	21%; or, if higher, 9%, and $0.45 each
61.02.132	Having a chest measurement of less than 80 centimetres	36%, and $7 per kg; or, if higher, 21%, and $0.75 each and $7 per kg	21%, and $7 per kg; or, if higher, 9%, and $0.45 each and $7 per kg
61.02.139	Other	36%, and $14 per kg; or, if higher, 21%, and $0.75 each, and $14 per kg	21%, and $14 per kg, or, if higher, 9%, and $0.45 each, and $14 per kg
61.02.19	Other:		
61.02.191	As prescribed by by-law	39%; or, if higher, 24%, and $0.45 each	22.5%; or, if higher, 13%, and $0.23 each
61.02.192	Having a chest measurement of less than 80 centimetres	39%, and $7 per kg; or, if higher, 24%, and $0.45 each, and $7 per kg	22.5%, and $7 per kg; or, if higher, 13%, and $0.23 each, and $7 per kg
61.02.199	Other	39%, and $14 per kg; or, if higher, 24%, and $0.45 each, and $14 per kg	22.5%, and $14 per kg or, if higher, 13%, and $0.23 each, and $14 per kg
61.02.2	Coats, not being goods falling within sub-item 61.02.5:		
61.02.21	Wholly or partly of wool, measuring 1.07 metres or less from collar seam to foot of coat:		
61.02.211	As prescribed by by-law	43%, or, if higher, 30%, and $0.98 each	17%; or, if higher, 9%, and $0.34 each
61.02.212	Having a chest measurement of less than 80 centimetres	43%, and $6 per kg; or, if higher, 30%, and $0.98 each, and $6 per kg	17%, and $6 per kg, or, if higher, 9%, and $0.34 each, and $6 per kg
61.02.219	Other	43%, and $12 per kg, or, if higher, 30%, and $0.98 each, and $12 per kg	17%, and $12 per kg, or, if higher, 9%, and $0.34 each, and $12 per kg
61.02.22	Wholly or partly of silk or wholly or partly of man-made fibres, but not containing wool, measuring 1.07 metres or less from collar seam to foot of coat:		
61.02.221	As prescribed by by-law	49%, or, if higher, 34%, and $0.75 each	22.5%; or, if higher, 13%, and $0.23 each
61.02.222	Having a chest measurement of less than 80 centimetres	49%, and $6 per kg, or, if higher, 34%, and $0.75 each, and $6 per kg	22.5%, and $6 per kg; or, if higher, 13%, and $0.23 each, and $6 per kg
61.02.229	Other	49%, and $12 per kg, or, if higher, 34%, and $0.75 each, and $12 per kg	22.5%, and $12 per kg, or, if higher, 13%, and $0.23 each, and $12 per kg
61.02.23	Measuring 1.07 metres or less from collar seam to foot of coat, not being goods falling within a preceding paragraph of this sub-item:		
61.02.231	As prescribed by by-law	49%; or, if higher, 34%, and $0.45 each	22.5%; or, if higher, 13%, and $0.15 each
61.02.232	Having a chest measurement of less than 80 centimetres	49%, and $6 per kg; or, if higher, 34%, and $0.45 each, and $6 per kg	22.5%, and $6 per kg; or, if higher, 13%, and $0.15 each, and $6 per kg
61.02.239	Other	49%, and $12 per kg, or, if higher, 34%, and $0.45 each, and $12 per kg	22.5%, and $12 per kg; or, if higher, 13%, and $0.15 each, and $12 per kg
61.02.24	Wholly or partly of wool, measuring more than 1.07 metres from collar seam to foot of coat:		
61.02.241	As prescribed by by-law	43%; or, if higher, 30%, and $1.50 each	17%; or, if higher, 9%, and $0.49 each
61.02.242	Having a chest measurement of less than 80 centimetres	43%, and $6 per kg, or, if higher, 30%, and $1.50 each, and $6 per kg	17%, and $6 per kg; or, if higher, 9%, and $0.49 each, and $6 per kg
61.02.249	Other	43%, and $12 per kg, or, if higher, 30%, and $1.50 each, and $12 per kg	17%, and $12 per kg, or, if higher, 9%, and $0.49 each, and $12 per kg
61.02.25	Wholly or partly of silk or wholly or partly of man-made fibres, but not containing wool, measuring more than 1.07 metres from collar seam to foot of coat:		
61.02.251	As prescribed by by-law	49%; or, if higher, 34%, and $1.28 each	22.5%; or, if higher, 13%, and $0.38 each
61.02.252	Having a chest measurement of less than 80 centimetres	49%, and $6 per kg; or, if higher, 34%, and $1.28 each, and $6 per kg	22.5%, and $6 per kg; or, if higher, 13%, and $0.38 each, and $6 per kg
61.02.259	Other	49%, and $12 per kg, or, if higher, 34%, and $1.28 each, and $12 per kg	22.5%, and $12 per kg, or, if higher, 13%, and $0.38 each, and $12 per kg
61.02.26	Measuring more than 1.07 metres from collar seam to foot of coat, not being goods falling within a preceding paragraph of this sub-item:		
61.02.261	As prescribed by by-law	49%; or, if higher, 34%, and $0.98 each	22.5%; or, if higher, 13%, and $0.30 each
61.02.262	Having a chest measurement of less than 80 centimetres	49%, and $6 per kg, or, if higher, 34%, and $0.98 each, and $6 per kg	22.5%, and $6 per kg, or, if higher, 13%, and $0.30 each, and $6 per kg
61.02.269	Other	49%, and $12 per kg, or, if higher, 34%, and $0.98 each, and $12 per kg	22.5%, and $12 per kg, or, if higher, 13%, and $0.30 each, and $12 per kg

8 Omit sub-items 61.02.4 to 61.02.6 (inclusive), substitute the following sub-items:

61.02.4	Blouses or skirts:		
61.02.41	As prescribed by by-law	49%; or, if higher, 34%, and $0.60 each	22.5%, or, if higher, 13%, and $0.26 each
61.02.42	Blouses having a chest measurement of less than 80 centimetres	49%, and $6 per kg, or, if higher, 34%, and $0.60 each, and $6 per kg	22.5%, and $6 per kg, or, if higher, 13%, and $0.26 each, and $6 per kg
61.02.49	Other	49%, and $12 per kg; or, if higher, 34%, and $0.60 each, and $12 per kg	22.5%, and $12 per kg; or, if higher, 13%, and $0.26 each, and $12 per kg

Tariff no.	Goods	Rates of duty General	Preferential
61.02.5	Coats of textile fabric coated, covered or laminated with artificial plastic material resembling leather; ski jackets; parkas; other jackets, being rainwear:		
61.02.51	Measuring 1.07 metres or less from collar seam to foot of coat:		
61.02.511	Wholly or partly of wool	43%; or, if higher, 30%, and $0.98 each	17%; or, if higher, 9%, and $0.34 each
61.02.512	Wholly or partly of silk or wholly or partly of man-made fibres, but not containing wool	49%; or, if higher, 34%, and $0.75 each	22.5%; or, if higher, 13%, and $0.23 each
61.02.519	Other	49%; or, if higher, 34%, and $0.45 each	22.5%; or, if higher, 13%, and $0.15 each
61.02.59	Other:		
61.02.591	Wholly or partly of wool	43%; or, if higher, 30%, and $1.50 each	17%; or, if higher 9%, and $0.49 each
61.02.592	Wholly or partly of silk or wholly or partly of man-made fibres, but not containing wool	49%; or, if higher, 34%, and $1.28 each	22.5%; or, if higher, 13%, and $0.38 each
61.02.599	Other	49%; or, if higher, 34%, and $0.98 each	22.5%; or, if higher, 13%, and $0.30 each
61.02.6	Dressing gowns, kimonos, bathgowns and the like:		
61.02.61	As prescribed by by-law	47%; or, if higher, $0.319 each	21%
61.02.62	Having a chest measurement of less than 80 centimetres	47%, and $5 each; or, if higher, $5.319 each	21%, and $5 each
61.02.69	Other	47%, and $10 each; or, if higher, $10.319 each	21%, and $10 each
	9 Omit sub-item 61.03.2, substitute the following sub-item:		
61.03.2	Sleepwear:		
61.03.21	As prescribed by by-law	43%; or, if higher, $1.43 per doz.	17%
61.03.29	Other	43%, and $9 per kg; or, if higher, $1.43 per doz., and $9 per kg	17%, and $9 per kg
	10 Omit sub-items 61.04.2 and 61.04.3, substitute the following sub-items:		
61.04.2	Sleepwear:		
61.04.21	As prescribed by by-law	43%	17%
61.04.22	Having a chest measurement of less than 80 centimetres	43%, and $2 each	17%, and $2 each
61.04.29	Other	43%, and $4 each	17%, and $4 each
61.04.3	Shirts:		
61.04.31	As prescribed by by-law	47%; or, if higher, $0.08 each	21%
61.04.32	Having a chest measurement of less than 80 centimetres	47%, and $6 per kg; or, if higher, $0.08 each and $6 per kg	21%, and $6 per kg
61.04.39	Other	47%, and $12 per kg; or, if higher, $0.08 each and $12 per kg	21%, and $12 per kg
61.04.4	Other undergarments	47%; or, if higher, $0.08 each	21%

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

Transformers: anti-dumping action. The Australian Government has taken action against the dumping of 225 mVA power transformers from the United Kingdom. Australian customs officials in London have been asked to carry out inquiries to establish normal value. Ref. CRE 36493. Inquiries: 01-215 5319.

Ceramic tableware: Industries Assistance Commission reference. A reference has been sent to the Industries Assistance Commission asking for a report on whether assistance should be given to the production in Australia of tableware and other goods of a kind commonly used for domestic or toilet purposes, being goods of porcelain, china or other kinds of pottery falling within Item 69.11 or 69.12 of the customs tariff.

UK firms or trade associations intending to submit evidence at the public hearing should advise the Secretary, Industries Assistance Commission, PO Box 80, Canberra, ACT 2600, Australia without delay. Evidence may be submitted either through the accredited agent of the firm or trade association concerned or through the Australian British Trade Association, 21 Tothill Street, London SW1 (tel. 01-799 7447). The association charges a fee for its services, the amount varying according to the work entailed in the preparation of a submission and whether or not the interested party is a member. Ref. CRE 513/75. Inquiries: 01-215 5319.

Cellulose acetate flake. Industries Assistance Commission report. A notice in *Trade and Industry*, 26 September 1974, reported a reference to the Industries Assistance Commission on the question whether the Australian Government should assist production in Australia of cellulose acetate flake after expiration of the Cellulose Acetate Flake Bounty Act on 30 June 1976.

The commission reported its findings on 29 January 1976 and the Government has accepted its recommendation that no assistance be accorded the production of cellulose acetate flake in Australia. In making its decision the Government had noted that the sole local producer of cellulose acetate flake had ceased production in December 1975. The Government's decision means that no action will be taken to extend the period of application of the Cellulose Acetate Flake Bounty Act, and that imports of cellulose acetate flake will be admissible at minimum rates. Ref. CRE 1264/74. Inquiries: 01-215 5319.

IAC report on hosiery accepted. The Australian Government has announced its acceptance of IAC Report on Hosiery of 11 December 1975. The goods affected are now subject to 30 per cent Import Duty (General and Preference rates). They are:

BTN no.	Description
60.03	Stockings, understockings, socks, ankle-socks, sockettes and the like, knitted or crocheted, not elastic or rubberised
60.04 400	Undergarments, knitted or crocheted, not elastic or rubberised, viz. tights (includes panti hose)

Inquiries: OTAR 01-248 5757 ext. 468/469/401.

New Zealand

Customs tariff review. The following notice, received from Wellington, is reproduced to remind British exporters of the New Zealand customs tariff review (see *Trade and Industry*, 27 June 1975, page 779).

The tariff review is being carried out by a committee set up by the New Zealand Customs Department. Its terms of reference are to change the structure of the tariff and this will include re-drafting – changing rates of duty and including a statistical column at the right of the rates of duty.

The committee will eventually submit a report to Government setting out its reasons for any changes, but the report will cover all submissions in respect of the review. The Customs Department will not be making any statement concerning its recommendations or individual submissions.

After the Government's consideration, a bill will be presented to Parliament and the outcome of all submissions will be incorporated in the act which will set out the re-drafting and new rates of duty effective from 1 July 1978.

The timetable of this review was revised and escalated (see *Trade and Industry*, 28 May 1976 page 563).

Ref. CRE 45466. Inquiries: CRE 01-215 5321.

CRE Commercial Relations and Exports Divisions
Tel. Direct dialling (see end of each notice)

OTAR Overseas Tariffs and Regulations Section
Tel. 01-248 5757 (extension at end of each notice)

Papua New Guinea

Tax exemptions. The Papua New Guinea Government has recently introduced changes to the law governing tax holidays for certain national businesses. A notice explaining the last change in the law, which provided for a five year tax holiday for wholly owned Papua New Guinea business groups, co-operatives and companies was published in *Trade and Industry* of 25 July 1975.

Under the new legislation where a profitable company is taken over a 50 per cent tax exemption only will be given up to the level of the previous profits. Any increase in the profits, however, or expansion in activities would qualify for total tax exemption. A sliding scale has been introduced for the amount of exemption to be granted to companies with a minority foreign interest up to 26 per cent of the equity. CRE 36488. Inquiries: CRE 01-215 5321.

United States

Footwear—American selling price. The *Federal Register* dated 13 July 1976 published a notice amending the Customs Regulations on the application of American Selling Price on certain type of footwear classifiable under item 700.60 of the Tariff Schedules, with effective date of 12 August 1976.

A copy of the text is available. Inquiries: OTAR 01-248 5757 ext. 456/457/7312.

Argentina

Further information on lifting of import suspensions. Further to the notice published in *Trade and Industry* of 16 July (page 192), a copy of Ministry of Economy Resolution ME 292 of 7 July 1976 has now been received. Copies of this and an unofficial translation are available upon request.

Some goods are still subject to import suspension. These are:

22.09.00.10	22.09.00.99	24.02.02.00	33.06.00.01	33.06.00.50	43.01.00.01
43.01.00.99	43.02.00.00	43.03.00.00	43.04.00.00		

The termination date of this suspension remains unaltered, ie 31 December 1977.

Inquiries: OTAR 01-248 5757 ext. 474/476.

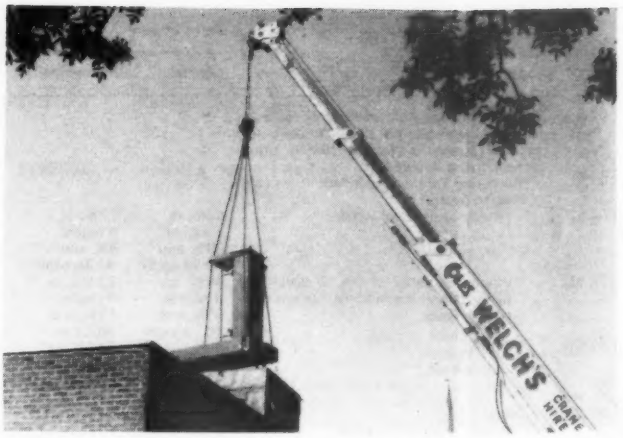
Brazil

Prohibition on goods imported in to Free Zone of Manaus being transferred to the rest of Brazil. Ministerio da Fazenda Portaria No. 146 of 29 April 1976 prohibited the transfer of foreign goods imported into the Free Zone of Manaus to the rest of Brazil for any reason. The only exceptions to this are passengers baggage within the strict limits laid down in recent legislation. Any infringements of this prohibition are punishable by the seizure of the goods.

Copies of an unofficial translation of Portaria 146 are available. Inquiries: OTAR 01-248 5757 ext. 476/474.

Registered trade marks

The lists of tariff, customs and import regulation changes in overseas countries published in this section of *Trade and Industry* sometimes contain words which are registered trade marks in the United Kingdom. So far as is practicable, all lists of goods are checked before publication from this point of view. Items which fall into this category are preceded by the letters rtm. Readers should note that this prefix signifies that the words are registered as trade marks in the United Kingdom but that in the present context are assumed to refer generally to products of the descriptions stated in brackets. While every attempt will be made to ensure that the scrutiny is complete, the lists may contain other words which are registered as trade marks in the United Kingdom or in other countries but which it has not been possible to identify.



Delivery of the first production model of what is claimed to be the world's largest high pressure crystal puller started in an unusual way when it had to be lifted out through the roof of the Metals Research factory at Melbourn, Herts. The Melbourn Crystal Production System is to be delivered to a leading semiconductor manufacturer in the USA for growing single crystals of gallium phosphide, a semiconductor material used for light emitting diodes. Because of its size – the equipment weighs three tons and is 16 ft high – it was lifted through a hole in the roof. Metals Research is part of the Cambridge Instrument Co.

Uruguay

Exemption from 18 per cent additional import tax. Decree 346/976 of 17 June 1976 extends for a period of one year from 10 June 1976 the exemption from the 18 per cent additional import tax granted to imports of sacchariferous seeds, agricultural and industrial machinery, their parts and pieces for refineries, etc. This Decree extends Decree 154 of 18 March 1976.

This concession will only apply to imported goods which are not competitive to nationally produced goods.

Termination date of exemption from payment of Port Dues. The exemption from the payment of Port Dues granted to machinery, tools and other equipment required for arable and animal farming by Law 12. 676 of 17 December 1969 will terminate on 31 December 1976.

Tariff amendment. Decree 321/976 of 10 June 1976 amends BTN 13.03.01 to read as follows:

Tariff no.	Description	Unit	Valuation	Duty
13.03	Vegetable saps and extracts, pectic substances, pectinates and pectates; agar-agar and other mucilages and thickeners derived from vegetable products			
01	Vegetable juices and extracts:			
01	Of male fern (abrotanum)		*Ad val.*	91.775%
02	Liquorice	1,000k	33.60	91.775%
03	Of aloes	1,000k	14.60	91.775%
04	Of opium, ipecucuanha, ergot of rye, hydrastiscanadensis	1,000k	1,622.40	34.775%
05	Podophyllin and chinchona	1,000k	405.60	91.775%
06	Extracts of cola nut base for the preparation of beverages	1,000k	2,318.00	91.775%
07	Extract of pyrethrum	1,000k	81,708.92	91.775%
08	Other fluid, solid and paste extracts	1,000k	243.36	91.775%
99	Other		*Ad val.*	91.775%

Inquiries: OTAR 01-248 5757 ext. 474/476.

Statistics

The economy: selected indicators

Series are seasonally adjusted except where shown otherwise

	Gross domestic product (average estimate)	Consumers' expenditure	Fixed capital expenditure			Changes in stocks				Balance of payments		
			Total	of which: Manufacturing industry	of which: Distributive and service industries excl. shipping	Total	of which: Manufacturing industry	of which: Wholesalers	of which: Retailers	Current balance	Visible balance	Invisible balance
	at 1970 prices		at 1970 prices			at 1970 prices				at current prices		
Base of index	1970											
Series in		£ million	£ million			£ million				£ million		
Stock level at end-1975						18,054	10,368	1,807	1,916			
1970	100	31,472	9,380	2,130	1,726	425	325	68	−30	735	−25	760
1971	102	32,396	9,544	1,991	1,801	70	−148	52	−10	1,058	280	778
1972	104	34,344	9,754	1,738	1,956	−18	−175	48	−11	131	−702	833
1973	110	35,894	10,008	1,864	2,114	1064	396	102	334	−842	−2,332	1,490
1974	110	35,521	9,805	2,087	1,959	597	666	81	−68	−3,611	−5,264	1,653
1975	108	35,413	9,768	1,809	1,716	−648	−386	−111	6	−1,700	−3,200	1,500
1973 4th qtr	109	8,958	2,513	476	545	205	96	32	51	−373	−950	577
1974 1st qtr	106	8,835	2,532	519	511	−176	−31	18	−59	−849	−1,297	448
2nd qtr.	110	8,789	2,339	513	487	295	191	43	27	−959	−1,366	407
3rd qtr.	112	8,905	2,418	516	485	373	368	3	−14	−852	−1,253	401
4th qtr.	111	8,992	2,516	539	476	105	139	17	−22	−951	−1,348	397
1975 1st qtr.	110	9,041	2,490	493	433	−176	−4	−31	−57	−466	−850	384
2nd qtr.	107	8,839	2,394	457	432	−254	−112	−54	−52	−360	−681	321
3rd qtr.	107	8,729	2,496	434	432	−156	−204	−29	60	−571	−986	415
4th qtr.	108	8,804	2,388	424	420	−62	−66	4	55	−303	−683	380
1976 1st qtr.	110	8,912	2,518	433	407	−47	16	15	−17	−60	−470	410
2nd qtr.		8,875 pe								−574	−964	390
% change last 2 qtrs. on prev. 2 qtrs.	+1.9	+1.4	+0.3	−3.8	−4.3							
on a year earlier	−1.2	−0.5	−2.0	−17.0	−9.0							

	Industrial production		Personal expenditure		Prices and costs (NOT seasonally adjusted)					Labour (UK)			Visible Trade	
	Total all industries	Total manufacturing industries	Retail sales	Cars: new registrations	Retail prices	% increase on a year earlier	Wholesale prices: all manufacturing industry: basic materials and fuel used	Wholesale prices: all manufacturing industry: manufactured products: home sales	Basic hourly wage rates of manual workers (all industries and services)	Unemployed excluding school leavers and adult students: mid-month count	Unemployed excluding school leavers and adult students: % of total employees	Unfilled vacancies for adults: mid-month count	Export	Import
	at 1970 prices		at 1971 prices	monthly averages									On a balance of payments basis: at 1970 prices	
Base of index	1970	1970	1971		Jan. 1974		1970	1970	July 1972				1970	1970
£m in base year			15,895										7 907	7,932
Series in				thousands						thousands		thousands		
1971	100.4	99 6	100.0	108.5	153.4†	9.4	104.6	109.0	88.9	775.8	3.4	130.9	106.7	104.2
1972	102.7	102.4	105.8	138.6	164.3†	7.1	109.2	114.8	101.4	855.0	3.7	147.3	106.6	116.3
1973	110.2	110.8	110.7	137.1	179.4†	9.2	144.5	123.2	115.6	611 0	2.6	307.0	121.8	133.9
1974	106.3	108.1	109.9	102 8	108.5	16.0	215.3	152.0	138.7	599.5●	2.6●	302.2●	130.1	135.2
1975	101.0	101.4	107.9	97.2	134.8	24.2	235.4	188.7	179.0	929.0	4.0	148.2●	124.9	125.6
1974 2nd qtr.	107.8	109.6	107.8	105	107.5	15.8	213.7	148.9	132.3	577.4	2.5	318.4	134.0	137.5
3rd qtr.	108.1	110.0	111.2	107	110.2	17.0	212.9	156.1	144.0	613.7	2.6	308.7	133.4	136.4
4th qtr.	105.0	105.9	111.3	97	115.1	18.2	222.1	164.9	153.5	..	..	..	126.5	133.0
1975 1st qtr.	104.6	106.1	111.3	108	122.0	20.3	220.9	176.0	163.6	737.9	3.2	..	128.9	125.4
2nd qtr.	99.8	100.0	108.9	94	133.6	24.3	225.6	186.3	176.3	847.4	3.6	164.4	122.6	122.2
3rd qtr.	99.3	99.5	105.5	103	139.4	26.6	239.3	193.4	185.5	1,000.0	4.3	133.6	120.0	127.4
4th qtr.	100.5	100.1	105.8	84	144.2	25.3	256.0	199.1	193 8	1,132.1	4.9	113.6	128.3	127.2
1976 1st qtr.	101.4	101.7	107.3	106	149.4	22.5	266.1	206.9	205.5	1,223.2	5.2	115.5	132.1	123.8
2nd qtr.				106	154.9	16.0	291.1 p	214.4 p	211.6 p	1,246.5	5.3	119.6	137.3 p	134.7 p
1975 June	99.1	99.4	104.1	91	137.1	26 1	227.7	189.0	182.6	893.5	3.8	149.0	120.2	122.7
July	99.8	100.2	105.4	91	138.5	26.3	233.2	191.7	184.8	968.2	4.1	133.9	123.0	134.3
Aug.	98.1	98.3	104.8	98	139.3	26.9	241.4	193.5	185.6	997.4	4.3	135.9	115.2	124.9
Sept.	99.8	100.0	106.1	120	140.5	26.6	243.2	194.9	186.0	1,034.4	4.4	131.1	121.9	123.1
Oct.	100.9	100.7	104.8	85	142.5	25.9	252.3	197.0	187.5	1,088.7	4.7	118.9	130.5	128.9
Nov.	100.9	100.7	105.2	81	144.2	25.2	256.7	198.9	195.6	1,133.0	4.9	111.8	123.4	128.0
Dec.	99.6	98.8	107.0	87	146.0	24.9	259.0	201.5	198.2	1,174.6	5.0	110.1	130.9	124.7
1976 Jan.	101.0	102.0	109.8	115	147.9	23.4	261.0	204.8	202.1	1,210.5	5.2	111.1	131.9	125.8
Feb.	101.8	101.6	107.1	101	149.8	22.9	263.5	207.3	206.4	1,232.4	5.3	113.5	128.4	125.4
Mar.	101.5	101.4	105.5	101	150.6	21.2	273.8	208.6	207.9	1,226.6	5.3	122.0	136.1	120.3
Apr.	102.0	102.2	108.5	118	153.5	18.9	285.2	211.5	209.3	1,233.7	5.3	123.9	136.5	131.1
May	103.1	104.2	105.7	112	155.2	15.4	290.6 p	214.8 p	210.6	1,250.0	5.4	120.6	138.3	136.9
June				88	156.0	13.8	297.6 p	217.0 p	214.9 p	1,255.7	5.4	114.3	137.1 p	136.1 p
July										1,294.0 p	5.5	119.6		
% change latest 3 months on prev. 3 months	+1.4	+1.8	−1.3	+0.3	+3.7		+9.4	+3.6	+3.0	+2.9		−1.9	+4	+9
on a year earlier	+1.0	+1.2	−4.0	+13.2	+16.0		+29.0	+15.1	+20.0	+40.1		−21.0	+12	+10

p Provisional pe Preliminary estimate † Base of index Jan. 1962 = 100 .. not available ● Average of 11 months

Symbols used in all statistical tables

.. not available	r revised
— nil or less than half the final digit shown	* five week period
p provisional	e fifty-three week period

Motor vehicle output in June

Production of cars in the five weeks ending 26 June of 129,547 units (25,909 per week) was 18 per cent above the level in June 1975. In the first six months to June 1976, car production was 6 per cent higher than in the same period last year. Production for export rose by 4 per cent and that for the home market by 7 per cent.

Production of commercial vehicles of 36,164 units (7,233 per week) was 4 per cent higher than in June last year. Production in the first half of 1976 was 7 per cent lower than in the corresponding period of 1975, production for the home market falling 18 per cent while production for export rose by 5 per cent.

(The summaries which follow are based on the seasonally adjusted figures in Table 2.)

Cars

June passenger car production of 109,000 units was 3 per cent above the monthly average for 1975. Output in the second quarter fell by 5 per cent compared with the first quarter; within the total, home market production fell by 3 per cent and production for export fell by 8 per cent.

Commercial vehicles

Production of commercial vehicles of 29,000 units was 9 per cent below the average monthly level in 1975. In the period April to June, output fell by 4 per cent, compared with the preceding three months. Output for the home market was virtually unchanged while output for export fell by 8 per cent.

TABLE 2 Production – seasonally adjusted

The seasonally adjusted series has been adjusted to exclude the effect of regularly recurring influences (eg holidays) but the figures still reflect the effect of factors that do not recur regularly (eg strikes).

Care should be taken not to interpret changes between one month and another as necessarily indicating the underlying trend. The averages in the latest three months and the previous three months gave a more reliable guide to recent changes.

MONTHLY AVERAGE — Thousands

	Passenger cars			Commercial vehicles		
	For home market	For export	Total	For home market	For export	Total
1968	84	67	151	21.6	12.5	34.1
1969	74	69	143	22.7	16.1	38.8
1970	77	60	137	22.3	15.8	38.1
1971	86	59	145	22.3	15.7	38.0
1972	109	51	160	22.7	11.3	34.0
1973	95	50	145	21.5	13.2	34.7
1974	78	50	128	19.3	14.2	33.5
1975	61	45	106	16.1	15.5	31.6
1975 1st quarter	80	46	126	20.4	16.5	36.9
2nd quarter	47	44	91	15.6	14.6	30.2
3rd quarter	60	47	107	15.4	14.9	30.3
4th quarter	58	41	99	13.4	16.1	29.5
1976 1st quarter	69	48	117	14.8	17.0	31.8
2nd quarter	67	44	111	14.8	15.6	30.4
1975 January	76	48	124	20.5	17.6	38.1
February	97	45	142	21.6	17.0	38.6
March	68	44	112	19.1	15.0	34.1
April	65	49	114	17.8	15.2	33.0
May	34	34	68	15.6	14.4	30.0
June	43	48	91	13.5	14.2	27.7
July	57	47	104	15.0	15.0	30.0
August	50	46	96	14.4	15.4	29.7
September	72	48	120	16.7	14.6	31.1
October	57	36	93	14.0	15.7	29.6
November	58	43	101	13.1	16.1	29.2
December	59	44	103	13.0	16.6	29.6
1976 January	56	41	97	12.4	17.2	29.6
February	80	54	134	16.0	17.3	33.3
March	71	50	121	15.9	16.6	32.5
April	64	40	104	14.4	15.4	29.8
May	74	48	122	15.9	16.5	32.4
June	63	46	109	13.9	15.1	29.0
Average of:						
Jan.-Mar. 1976	69	48	117	14.8	17.0	31.8
Apr.-June 1976	67	44	111	14.8	15.6	30.4
Percentage change	–3	–8	–5	N/C	–8	–4

TABLE 1 Recorded production

Production figures of road motor vehicles cover complete vehicles, chassis with engines for delivery as such and un-assembled vehicles for export. Road tractors are included but battery operated road vehicles are excluded.

Production for export may differ from actual exports as recorded in the Overseas Trade Statistics because of differences in timing and coverage.

		Passenger cars (including taxis)				Commercial road vehicles			
	No. of weeks	For home market	For export	Totals	Weekly average	For home market	For export	Totals	Weekly average
1968	52	1,013,163	802,773	1,815,936	34,922	259,331	149,855	409,186	7,869
1969	53	892,758	824,315	1,717,073	32,398	272,998	192,778	465,776	8,788
1970	52	918,109	722,857	1,640,966	31,557	267,407	190,125	457,532	8,799
1971	52	1,027,462	714,478	1,741,940	33,499	268,278	187,928	456,206	8,773
1972	52	1,307,881	613,430	1,921,311	36,948	272,649	135,470	408,119	7,848
1973	52	1,142,216	605,105	1,747,321	33,602	257,574	159,049	416,623	8,012
1974	52	937,932	596,187	1,534,119	29,502	232,373	170,193	402,566	7,742
1975	52	735,532	532,164	1,267,696	24,379	194,319	186,386	380,705	7,321
1975 1st quarter	13	242,571	139,736	382,307	29,408	61,402	46,808	108,210	8,324
2nd quarter	13	145,107	142,664	287,771	22,136	49,650	48,435	98,085	7,545
3rd quarter	13	151,830	117,925	269,755	20,750	39,136	38,724	77,860	5,989
4th quarter	13	196,024	131,839	327,863	25,220	44,131	52,419	96,550	7,427
1976 1st quarter	13	209,955	148,844	358,799	27,600	44,978	48,785	93,763	7,213
2nd quarter	13	205,839	143,677	349,516	26,886	46,510	51,249	97,759	7,520
1975 January	4	79,301	46,278	125,579	31,395	19,997	14,429	34,426	8,606
February	4	84,826	43,032	127,858	31,964	19,669	15,619	35,288	8,822
March	5	78,444	50,426	128,870	25,774	21,736	16,760	38,496	7,699
April	4	57,260	48,895	106,155	26,539	16,866	14,418	31,284	7,821
May	4	35,750	36,423	72,173	18,043	15,879	16,070	31,949	7,987
June	5	52,097	57,346	109,443	21,888	16,905	17,947	34,852	6,970
July	4	39,303	32,345	71,648	17,912	10,995	12,480	23,475	5,869
August	4	40,219	38,525	78,744	19,686	10,117	10,271	20,388	5,097
September	5	72,308	47,055	119,363	23,873	18,024	15,973	33,997	6,799
October	4	60,873	36,246	97,119	24,280	14,964	16,352	31,316	7,829
November	4	65,941	46,021	111,962	27,991	13,994	16,300	30,294	7,574
December	5	69,210	49,572	118,782	23,756	15,173	19,767	34,940	6,988
1976 January	4	56,966	39,432	96,398	24,100	12,051	13,971	26,022	6,506
February	4	68,878	50,913	119,791	29,948	14,468	15,829	30,297	7,574
March	5	84,111	58,499	142,610	28,522	18,459	18,985	37,444	7,489
April	4	54,445	38,281	92,726	23,182	13,209	14,019	27,228	6,807
May	4	76,074	51,169	127,243	31,811	16,122	18,245	34,367	8,592
June	5	75,320	54,227	129,547	25,909	17,179	18,985	36,164	7,233

Activity in the textile and clothing industry

This article reviews activity in the textile and clothing industries during the first quarter of 1976. It is one of a series published at intervals in *Trade and Industry*.

Home demand (Table 1)

There was a marked upturn in consumers' expenditure on clothing and household textiles in the first quarter of the year, although expenditure on clothing was still 2 per cent below the very high level of the first quarter of 1975. The rise reflects at least in part the winter sales and pre-budget spending. The latest figures for retail sale by clothing and footwear shops indicate some falling away in the second quarter and, despite some possible resurgence in consumer interest as a result of the 'summer sales', little change is likely in the immediate future.

Output (Table 2)

Output of the textile industry rose marginally in the first quarter of the year but the latest figures suggest little change is likely in the second quarter. Performance varied from sector to sector but on the whole the figures tend to support the assessment of the previous article that the industry has begun to recover from the depression, stimulated to a considerable extent by rising exports which have been encouraged by an upsurge in overseas demand and favourable exchange rates for sterling.

In the man-made fibre sector output continued the improvement noted in the fourth quarter of last year, and was at its highest level since the third quarter of 1974. The cotton spinning and weaving sectors also showed improvements, but hosiery and other knitted goods registered a fairly sharp decline. In the woollen and worsted

TABLE 1 Comparison of textile and clothing output with some factors affecting demand

Index numbers 1970 = 100 (quarterly figures seasonally adjusted)

								1974			1975				1976	Growth rate per cent per annum	Growth per cent 12 months ended
	1969	1970	1971	1972	1973	1974	1975	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	1969/75	Q1 1976/ Q1 1975
Gross domestic product at factor cost (expenditure based)	98.2	100.0	102.3	104.0	109.6	110.2	108.4	110.6	112.5	110.8	110.1	107.4	106.9	109.7	113.3	1.6	−1.5
Consumer's expenditure																	
All items	97.6	100.0	102.9	109.1	114.1	112.9	112.5	111.7	113.2	114.3	114.9	112.3	110.9	111.9	113.3	2.4	−1.3
Clothing	96.8	100.0	100.6	108.1	114.4	113.2	115.1	109.2	115.8	114.7	119.9	114.0	113.8	112.6	117.4	2.9	−0.4
Household textiles and soft furnishings	104.2	100.0	105.2	115.9	122.8	117.0	118.3	113.5	116.3	113.5	128.7	113.5	117.6	113.5	134.2	2.1	1.4
Output of total manufacturing	99.6	100.0	99.6	102.4	110.9	107.8	101.4	109.3	109.6	105.6	106.1	100.0	99.9	99.8	101.7	0.3	−6.8
Output of textiles	100.2	100.0	100.8	103.0	108.6	99.2	93.8	104.8	101.4	92.6	94.2	93.8	92.7	94.5	95.2	−1.1	−4.3
Deliveries of made-up clothing	97.4	100.0	104.2	108.7	116.6	114.4	116.5	115.0	117.0	117.8	121.3	112.3	114.5	112.4	119.7	3.0	−2.6

TABLE 2 Output

Index numbers 1970 = 100 (quarterly figures seasonally adjusted)

	1968 MLH	Weights	1969	1970	1971	1972	1973	1974	1975	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.	Growth rate per cent per annum 1969/75	Growth per cent 12 months ended Q1 1976/ Q1 1975
Man-made fibres	411	14.5	91.8	100.0	106.1	107.2	127.3	111.1	100.9	116.0	115.8	94.8	90.7	101.2	101.1	110.7	114.0	1.6	2.3
Spinning and doubling on cotton system (a)	412	11.7	90.3	100.0	103.2	103.4	112.5	89.5	80.7	100.3	89.8	79.2	77.5	84.7	78.8	81.8	85.8	−1.9	−4.5
Weaving of cotton and man-made fibres	413	6.9	109.2	100.0	95.1	91.6	93.4	90.3	86.4	95.2	97.0	92.9	88.3	85.4	86.2	85.6	93.7	−3.8	−6.0
Woollen and worsted	414	17.6	109.6	100.0	93.0	97.7	97.5	86.7	77.6	93.8	88.2	79.0	79.4	79.6	76.2	75.1	79.1	−5.0	−8.9
Hosiery and other knitted goods	417	19.0	97.6	100.0	99.5	99.7	102.8	99.8	96.4	105.0	101.3	95.9	93.1	96.4	97.0	99.1	87.7	−0.2	−3.8
Carpets	419	8.0	99.0	100.0	107.8	121.9	125.9	116.6	111.2	116.1	114.3	112.5	116.0	113.3	108.6	106.8	108.1	2.0	−4.8
(Order XIII) (b)	411-429	100.0	100.2	100.0	100.8	103.0	108.6	99.2	93.8	104.8	101.4	92.6	94.2	93.8	92.7	94.5	95.2	−1.1	−4.3

(a) Includes texturing of man-made continuous filament yarns.
(b) In addition to sectors listed above includes jute, rope, twine and net, lace, narrow fabrics, made-up textiles, textile finishing and other textiles industries. Their combined weight in the total index is 22.3 per cent.

TABLE 3 Production of man-made fibres

Million kilogrammes

	1968	1969	1970	1971	1972	1973	1974	1975	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.	Growth rate per cent per annum 1968/75	Growth per cent 12 months ended Q1 1976/ Q1 1975
Staple fibre																		
Synthetic	124	135	170	166	177	221	196	178	53	53	37	37	48	44	49	52	5.3	7.2
Viscose and acetate	173	166	172	170	185	204	160	138	50	30	29	36	39	32	31	38	−3.2	−3.4
Total	297	301	342	336	362	425	356	316	103	83	66	73	87	76	80	90	0.9	2.5
Continuous filament yarn																		
Synthetic	144	156	167	191	196	233	200	185	51	49	48	42	46	44	53	52	3.6	2.6
Viscose and acetate	98	97	91	85	68	73	72	63	21	18	15	15	16	15	17	18	−6.1	−4.4
Total	242	253	258	276	264	306	272	248	72	67	63	57	62	59	70	70	0.4	0.8
All man-made fibres																		
Synthetic	268	291	337	357	373	454	396	363	104	102	85	79	94	88	102	104	4.4	4.9
Viscose and acetate	271	263	263	255	253	277	232	201	71	48	44	51	55	47	48	56	−4.2	−3.7
Total	539	554	600	612	626	731	628	564	175	150	129	130	149	135	150	160	0.6	1.7

sector and in carpets, output recovered from the trough of the second half of 1975, but remained below the levels of the first half of the year and slumped further in April and May.

There should be in a gradual improvement in textile output during 1976 as the upturn in the textile cycle gains momentum. Most of the stimulus is likely to come from increased export demand, but some easing upwards of home demand is also possible.

Employment (Table 6)

The rate of contraction of employment in the textiles and clothing industries experienced throughout 1975 eased towards the end of the year. On a seasonally adjusted basis, the latest figures indicate that the period of rapid shedding of labour has passed its peak and a slow process of stabilisation can now be expected.

Prices (Table 5)

Prices of raw cotton and wool moved up sharply in the first quarter of 1976 and were 60 per cent and 30 per cent respectively higher than the corresponding period of 1975. Although these increases are not yet fully reflected in manufactured product prices, it is notable that after a year of comparative stability, the price of cotton cloth rose by 7 per cent in the first three months of 1976. Worsted cloth also singularly demonstrates the inflationary effects of costlier imported materials and, compared with a year earlier, a 16 per cent price rise was registered.

Latest figures indicate that the prices of raw cotton and wool are still rising which, taken with higher electricity charges introduced in April, presage a further sharp increase in the price index numbers of materials and fuel purchases.

Overseas trade (Tables 7-10)

The overall trade deficit for textiles and clothing in the first quarter of 1976 stood at £157 million compared with £73 million in the corresponding quarter of 1975. Encouraged by favourable exchange rates and the economic recovery in some overseas markets, notably the USA, Federal German Republic, France and Scandinavia, export performance improved by an overall 28 per cent (from £261 million to £335 million) but the continuing rise in the level of imports (£340 million to £472 million) far outweighed this improvement. In the three main sectors (textile fibres, yarns and fabrics, and clothing) the value of imports increased by 80 per cent, 28 per cent and 43 per cent, respectively. The first partly reflects the substantial rise in the price of raw wool and cotton over the last year (Table 5) but, significantly, quantities imported also increased and could be indicative of returning confidence. The early filling in some cases of 1976 annual quotas for textile and clothing products gave temporary impetus to the rising inflow, which showed no signs of abating in the first quarter of the year. A gradual stabilisation at or around these levels during the remainder of the year seems likely, accompanied by increased overseas demand for UK products which have become progressively more competitive with the depreciation of sterling against major foreign currencies.

TABLE 4 Consumption of fibres

Million kilogrammes

									1974			1975				1976	Growth rate per cent per annum	Growth per cent 12 months ended
	1968	1969	1970	1971	1972	1973	1974	1975	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	1968/75	Q1 1976/ Q1 1975
In cotton spinning																		
Raw cotton	172	169	165	140	129	126	111	103	30	27	28	25	26	23	29	30	-6.9	-1.8
Man-made staple fibre																		
Rayon	43	39	33	34	32	36	39	30	11	10	9	8	9	6	7	7	-5.0	-23.7
Other	16	23	32	36	34	37	30	30	9	7	7	7	8	6	9	10	9.4	10.0
In top making wool spinning and felting																		
Wool and animal hair	192	190	166	151	165	149	121	122	36	28	26	30	32	28	32	35	-6.3	5.8
Man-made staple fibre	76	80	84	77	86	105	103	86	30	25	24	24	24	18	20	22	1.8	-18.4

TABLE 5 Prices

Index numbers 1970 = 100

									1974			1975				1976
	1968	1969	1970	1971	1972	1973	1974	1975	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	1st qtr.
Price index numbers of output (home sales):																
All manufactured products	89.9	93.4	100.0	109.0	114.8	123.2	152.0	188.7	148.9	156.1	164.9	176.0	186.3	193.4	199.2	206.9
Textile industries	94.1	96.9	100.0	104.9	112.2	131.7	162.2	178.6	160.4	166.5	170.1	172.9	175.7	180.7	185.1	193.0
Man-made fibre cloth	93.7	96.0	100.0	106.8	114.8	132.7	172.6	195.0	167.0	182.0	188.4	189.3	189.6	196.3	204.3	207.1
Cotton cloth	85.0	91.7	100.0	108.0	117.4	138.9	193.8	190.2	192.8	201.0	197.7	190.9	190.6	188.5	190.8	204.8
Worsted cloth	92.1	95.8	100.0	103.9	118.0	173.3	189.8	203.2	191.1	191.0	189.0	189.0	201.5	207.1	211.0	219.4
Socks, stockings and tights (inc. pantihose)	100.7	100.9	100.0	100.9	102.3	107.1	119.4	134.2	118.2	122.1	125.0	129.6	132.5	136.7	138.0	142.5
Knitted underwear and nightwear	93.0	97.1	100.0	104.2	111.1	126.8	154.7	178.5	148.9	158.7	169.5	174.1	175.4	182.1	182.5	190.3
Knitted outerwear	97.0	98.2	100.0	101.5	105.3	119.0	140.8	157.8	138.2	144.8	147.1	153.6	156.5	160.6	160.4	166.8
Carpets	93.6	96.6	100.0	104.9	111.7	130.2	153.1	177.8	150.6	158.8	161.6	169.5	171.2	180.2	190.5	200.2
Made-up clothing	94.3	96.4	100.0	106.4	112.3	119.4	138.3	159.4	135.2	140.2	146.7	152.6	156.3	161.9	166.7	N/A
Price index numbers of material and fuel purchased:																
Textile industries:	97.2	98.6	100.0	104.8	119.0	166.7	190.0	201.9	191.2	190.0	186.4	189.8	198.9	204.0	214.9	232.4
Commodities wholly or mainly imported:																
Raw cotton	104.4	96.4	100.0	112.9	116.6	204.2	229.5	196.9	228.9	212.9	182.3	165.8	188.6	209.6	223.7	264.6
Raw wool	117.6	112.4	100.0	94.9	156.3	312.3	250.3	120.7	264.9	232.2	195.7	194.0	208.9	212.1	227.8	250.4
Man-made fibres	97.9	98.5	100.0	103.1	103.6	105.8	137.9	156.9	136.5	149.5	154.1	152.7	152.2	159.8	162.8	166.9

TABLE 6 Employment in textiles (a)

Thousands

	MLH	June 1974	Sept. 1974	Dec. 1974	Mar. 1975	June 1975	Sept. 1975	Dec. 1975	Mar. 1976
Great Britain									
Textiles	411-429	545.9	544.6	530.3	510.5	503.8	497.5	493.0	490.6
Production of man-made fibres	411	38.7	38.6	36.8	35.4	34.7	34.7	35.1	34.8
Spinning and doubling on the cotton and flax systems	412	59.5	59.5	58.1	54.5	53.2	52.5	51.2	51.4
Weaving of cotton, linen and man-made fibres	413	47.1	47.4	46.7	45.5	46.0	45.0	43.9	43.6
Woollen and worsted	414	101.1	99.2	94.9	92.3	93.4	90.6	88.7	89.7
Hosiery and other knitted goods	417	124.9	126.2	124.7	117.6	115.0	113.0	112.6	111.7
Carpets	419	42.5	42.0	40.9	39.5	38.9	38.0	37.5	37.3
Textile finishing	423	49.8	50.1	48.3	46.9	45.9	46.8	47.2	46.8
Clothing	441-449	320.4	321.7	322.5	315.3	311.5	308.7	308.0	302.8

(a) Employees in employment at middle of each month.

TABLE 7 Crude trade balance (a)

£ million at current prices

	1968	1969	1970	1971	1972	1973	1974	1975	1974 2nd qtr.	1974 3rd qtr.	1974 4th qtr.	1975 1st qtr.	1975 2nd qtr.	1975 3rd qtr.	1975 4th qtr.	1976 1st qtr.
Textile fibres (Div. 26)																
Exports	93.2	101.8	96.4	87.3	108.1	172.1	201.8	183.5	61.1	48.7	37.0	43.2	52.1	41.3	46.9	57.6
Imports	219.4	210.4	183.9	150.0	213.7	322.4	310.5	263.4	92.8	72.2	56.6	56.1	74.2	70.4	62.6	101.2
Balance	−126.2	−108.6	−87.6	−62.7	−105.6	−150.3	−108.7	−79.9	−31.7	−23.5	−19.6	−12.9	−22.1	−29.1	−15.8	−43.6
Textile yarns, fabrics, etc. (Div. 65)																
Exports	309.3	360.6	396.8	425.8	445.4	589.5	745.8	698.2	204.6	178.6	183.1	165.1	174.5	161.4	197.2	203.4
Imports	231.2	238.7	256.4	324.9	369.7	514.9	688.2	682.8	167.9	180.0	170.8	166.8	166.0	167.4	182.6	212.7
Balance	+78.1	+121.9	+140.4	+100.9	+75.7	+74.6	+57.6	+15.4	+36.7	−1.4	+12.3	−1.7	+8.5	−6.0	+14.6	−9.3
Clothing (Div. 84)																
Exports	84.5	108.5	123.1	129.5	144.3	179.6	230.0	265.5	50.8	66.2	68.7	52.5	54.8	75.2	83.0	74.1
Imports	110.1	124.5	129.4	178.2	218.8	333.6	402.4	505.1	102.1	102.5	92.2	111.0	125.1	130.7	138.3	158.3
Balance	−25.6	−16.0	−6.3	−48.7	−74.5	−154.0	−172.4	−239.6	−51.3	−36.3	−23.5	−58.5	−70.3	−55.5	−55.3	−84.2

(a) Imports cif. exports fob.

TABLE 8 Imports

£ million at current prices (cif)

	Textile fibres (Div. 26)			Textile yarns, fabrics and made-up articles (Div. 65)										Clothing (Div. 84)		
	Man-made fibres, tow and waste (266)	Wool tops (262.8)	Total textile fibres	Woollen and worsted yarns (651.2)	Cotton yarns and thread (651.3 and .4)	Continuous filament yarns (part 651.6 and 651.7)	Spun man-made fibre yarns (part 651.6 and 651.7)	Cotton woven fabrics (652)	Woollen and worsted woven fabrics (653.2)	Man-made fibre woven fabrics (653.5 and 6)	Knitted fabrics (653.7)	Carpets (657.5 and .6)	Total yarns, fabrics etc.	Made-up clothing (841.1 and .2)	Hosiery and knitted garments (part* 841.4)	Total clothing
1968	17.4	2.3	219.4	2.0	8.8	25.4	3.6	67.3	8.8	33.0	7.0	18.8	231.2	58.4	44.9	110.1
1969	15.3	3.2	210.4	2.6	9.1	38.0	4.8	58.0	7.6	36.4	9.6	18.1	238.7	68.8	49.0	124.5
1970	13.3	3.3	183.9	3.9	9.8	38.4	5.6	53.5	7.6	42.2	13.0	20.1	256.4	70.7	51.4	129.4
1971	16.9	2.8	150.0	4.1	10.2	54.2	7.3	70.4	7.9	57.1	16.6	22.0	324.9	89.6	68.8	178.2
1972	24.9	4.3	213.7	6.3	12.5	52.8	9.2	74.2	8.2	78.6	14.0	28.0	369.7	123.7	82.7	218.8
1973	35.4	5.3	322.4	11.0	15.5	70.7	17.0	103.5	11.8	115.3	12.7	41.4	514.9	197.8	112.3	333.6
1974	57.2	4.8	310.5	9.5	42.8	105.2	30.2	130.5	13.5	154.5	16.4	44.9	688.2	243.9	134.1	402.4
1975	45.5	3.8	263.4	11.1	28.3	92.2	28.7	125.7	16.6	167.2	18.5	49.5	682.8	307.5	166.7	505.1
1974																
1st qtr.	11.8	1.2	88.9	2.2	10.7	17.8	6.5	42.3	3.2	37.6	3.5	10.7	169.5	64.3	35.6	105.6
2nd qtr.	14.7	1.6	92.8	2.7	11.4	26.7	7.8	31.1	3.8	35.3	3.9	10.3	167.9	63.4	32.9	102.1
3rd qtr.	18.2	1.0	72.2	2.2	11.1	34.6	8.3	28.4	3.4	39.4	4.6	12.5	180.0	61.5	34.9	102.5
4th qtr.	12.5	1.1	56.6	2.4	9.6	26.1	7.6	28.7	3.1	42.2	4.4	11.4	170.8	54.7	30.7	92.2
1975																
1st qtr.	10.4	1.0	56.1	2.2	6.6	20.7	5.9	31.7	3.2	44.5	3.6	12.7	166.8	68.0	37.2	111.0
2nd qtr.	10.8	0.8	74.2	3.0	6.8	20.6	6.8	29.8	5.0	41.4	4.3	11.7	166.0	79.4	39.5	125.1
3rd qtr.	12.1	1.1	70.4	2.8	7.0	24.9	7.0	30.1	5.0	39.9	5.4	11.5	167.4	75.7	45.9	130.7
4th qtr.	12.2	0.9	62.7	3.1	7.9	26.0	9.0	34.1	3.4	41.4	5.2	13.6	182.6	84.4	44.1	138.3
1976																
1st qtr.	14.5	0.9	101.2	3.6	9.5	29.4	9.8	43.6	4.0	47.6	4.6	16.0	212.7	97.9	52.5	158.3

* Less 841.45
Source: Overseas Trade Statistics.

TABLE 9 Exports

£ million at current prices (fob)

	Textile fibres (Div. 26)			Textile yarns, fabrics and made-up articles (Div. 65)										Clothing (Div. 84)		
	Man-made fibres, tow and waste (266)	Wool tops (262.8)	Total textile fibres	Woollen and worsted yarns (651.2)	Cotton yarns and thread (651.3 and .4)	Continuous filament yarns (part 651.6 and 651.7)	Spun man-made fibre yarns (part 651.6 and 651.7)	Cotton woven fabrics (652)	Woollen and worsted woven fabrics (653.2)	Man-made fibre woven fabrics (653.5 and .6)	Knitted fabrics (653.7)	Carpets (657.5 and .6)	Total yarns, fabrics etc.	Made-up clothing (841.1 and .2)	Hosiery and knitted garments (part* 841.4)	Total clothing
1968	33.6	24.0	93.2	20.4	10.7	46.1	4.3	28.2	66.5	20.6	11.4	29.5	309.3	45.7	26.2	84.5
1969	42.3	26.6	101.8	23.3	11.4	53.7	7.0	28.4	71.3	27.5	21.2	37.3	360.6	58.5	34.1	108.5
1970	47.0	20.4	96.4	23.4	11.0	68.6	8.6	26.7	70.1	32.3	38.9	39.4	396.8	60.5	45.0	123.1
1971	45.5	16.3	87.3	23.3	10.1	80.4	9.6	28.6	62.8	31.6	54.4	43.5	425.8	61.8	49.0	129.5
1972	56.5	19.8	108.1	27.3	11.7	83.8	10.9	29.0	66.9	37.4	43.2	51.6	445.4	70.2	53.5	144.3
1973	77.7	38.1	172.1	37.0	17.0	110.0	18.6	39.5	91.5	49.9	43.1	78.2	589.5	86.9	68.0	179.6
1974	118.7	26.2	201.8	41.6	22.0	136.5	28.1	52.0	106.6	68.6	44.9	100.6	745.8	113.4	81.8	230.0
1975	101.3	28.6	183.5	37.5	18.5	112.8	23.3	46.9	92.5	68.2	44.3	94.9	698.2	137.1	89.3	265.5
1974																
1st qtr.	29.3	8.6	55.0	10.5	5.0	37.4	6.9	11.9	24.6	15.8	10.8	24.5	179.5	22.0	15.4	44.3
2nd qtr.	35.7	7.8	61.1	12.1	5.7	41.5	8.0	13.6	29.8	18.4	11.6	26.9	204.6	26.2	16.5	50.8
3rd qtr.	33.1	4.9	48.7	9.6	5.7	29.2	6.6	12.6	26.4	16.8	11.3	23.1	178.6	31.6	24.9	66.2
4th qtr.	20.6	4.9	37.0	9.4	5.6	28.4	6.6	13.9	25.8	17.6	11.2	26.1	183.1	33.6	25.0	68.7
1975																
1st qtr.	26.2	5.2	43.2	8.3	4.6	26.9	5.9	12.1	21.9	17.6	8.2	22.2	165.1	27.0	17.2	52.5
2nd qtr.	32.1	7.0	52.1	9.4	4.4	28.0	5.9	10.7	24.4	16.7	11.8	22.2	174.5	29.8	16.8	54.8
3rd qtr.	21.4	8.0	41.3	8.7	3.9	25.8	4.6	11.2	23.8	15.0	11.4	20.5	161.4	37.9	26.8	75.2
4th qtr.	21.6	8.4	46.9	11.1	5.6	32.1	6.9	12.9	22.4	18.9	12.9	30.0	197.2	42.4	28.5	83.0
1976																
1st qtr.	26.9	11.0	57.6	11.1	5.3	35.4	7.7	16.1	19.7	20.6	10.9	32.1	203.4	37.8	25.3	74.1

* Less 841.45
Source: Overseas Trade Statistics.

TABLE 10 Imports of raw materials

£ million at current prices (cif)

	Greasy wool (262.1)		Degreased wool (262.2)		Fine animal hair (262.3)		Raw cotton* (263.1)	
	mn kg	£m	mn kg	£m	mn kg	£m	mn kg	£m
1968	181	73	66	26	13	11	193	51
1969	171	73	64	26	15	14	162	43
1970	149	58	57	22	10	9	167	44
1971	99	33	62	21	9	5	142	41
1972	130	56	77	23	18	13	137	44
1973	95	93	56	55	15	28	171	66
1974	65	67	56	48	9	21	93	61
1975	84	58	48	37	11	22	113	59
1974 1st qtr.	23	26	..	13	2	5	28	18
2nd qtr.	20	21	..	15	3	8	27	18
3rd qtr.	16	13	..	13	2	4	16	11
4th qtr.	6	7	..	7	2	4	22	14
1975 1st qtr.	19	13	8	6	2	3	23	11
2nd qtr.	29	19	16	12	3	6	32	16
3rd qtr	20	14	15	12	3	6	32	17
4th qtr.	16	12	9	7	3	7	26	15
1976 1st qtr.	35	32	10	10	3	8	38	23

* 1968-69 includes small amount of carded or combed cotton.
Source: Overseas Trade Statistics.

Output in the wool textile industry

The volume of production in the wool textile industry (as measured by the seasonally adjusted index of production) in May 1976 was 13 per cent more than in May 1975. Statistics issued by the Wool Industry Bureau of Statistics show that in the period January-May 1976 woven fabrics (excluding blankets) were 10 per cent lower than in January-May 1975; deliveries of worsted yarns (excluding semi-worsted yarn) were 4 per cent higher. Production of wool and hair tops was 26 per cent more and that of man-made fibre tops was 5 per cent less.

Output in the wool textile industry

	Consumption	Production			Deliveries			
	Raw wool (clean weight)	Tops		Woollen yarn (†)	Worsted yarn (§)	Woven fabrics (excluding blankets) (‡)		Blankets (†)
		Wool and hair	Man-made fibres			Woollen	Worsted	
	million kilos					million sq. metres		
1968	177.5	96.6	36.4	147.4	98.2	135.8	110.6	27.3
1969	174.5	92.0	42.2	142.2	100.5	130.1	109.2	26.9
1970	153.1	79.7	44.6	129.4	97.6	115.5	99.8	24.6
1971	141.2	66.2	36.6	130.7	93.0	101.9	83.9	28.5
1972	152.3	75.1	45.9	130.9	101.6	99.8	83.7	28.8
1973	136.6	62.2	55.9	135.2	100.0	104.0	88.4	30.6
1974	112.6	43.9	54.8	122.5	87.2	92.1	82.6	28.1
1975	110.6	46.8	44.4	112.1	75.5	76.8	74.6	24.7
1974 1st quarter	28.4	11.9	13.3	29.5	21.5	22.7	20.9	7.8
2nd quarter	33.6	12.8	15.5	36.7	23.5	25.8	21.2	7.2
3rd quarter	25.9	10.0	14.0	28.0	20.6	23.0	19.4	6.4
4th quarter	24.7	9.1	12.0	28.5	21.6	20.6	21.2	6.8
1975 1st quarter	27.3	11.2	12.8	29.4	20.4	17.7	20.7	7.6
2nd quarter	29.1	11.9	12.7	29.7	19.4	22.5	19.2	5.0
3rd quarter	25.5	11.4	9.2	24.6	15.7	19.8	17.1	5.7
4th quarter	28.7	12.3	9.6	28.4	19.9	16.8	17.6	6.4
1976 1st quarter	31.0	13.8	11.6	29.4	20.6	16.9	18.2	6.5
1975 January	8.9	3.6	4.3	9.9	7.0	6.1	7.3	2.3
February	9.1	3.8	4.2	9.5	6.4	5.6	6.6	2.9
March	9.3	3.9	4.4	10.1	7.0	6.1	6.8	2.5
April	9.6	4.1	4.5	9.8	6.9	7.0	6.5	1.8
May	9.3	3.5	3.7	9.9	6.0	7.2	6.3	1.7
June	10.2	4.3	4.5	10.0	6.4	8.2	6.4	1.6
July	9.0	4.5	3.8	8.0	5.1	6.7	6.4	1.9
August	7.0	2.7	2.2	7.5	4.7	5.9	4.5	1.7
September	9.5	4.2	3.2	9.1	5.9	7.2	6.2	2.1
October	9.7	4.0	3.6	9.9	7.2	6.6	6.4	2.1
November	9.7	4.3	3.6	9.2	6.5	5.4	5.7	1.9
December	9.3	4.0	2.4	9.3	6.2	4.8	5.5	2.4
1976 January	10.0	4.5	4.3	9.5	6.4	5.1	5.8	2.6
February	9.6	4.2	3.2	9.2	6.6	5.3	5.9	1.9
March	11.4	5.1	4.1	10.7	7.6	6.5	6.5	2.0
April		5.0	3.9	9.5	7.0	5.7	5.5	1.5
May		4.8	4.6	9.3	7.0	7.0	5.6	1.4

(†) Estimated. (‡) Woven woollen fabrics include fabrics which are mainly woollen by weight of components and, similarly, woven worsted fabrics include fabrics which are mainly worsted by weight of components. (§) From January 1969 includes semi-worsted yarn: previously yarn of this type was not separately distinguished and the small quantities involved were divided between the woollen and worsted yarn headings. In May deliveries of semi-worsted yarn were 0.7 million kilos.

Have you a good export picture?

Each week *Trade and Industry* publishes pictures illustrating Britain's export business. Companies with export successes are invited to send in the story with a photograph showing the goods in manufacture, ready for despatch, or, preferably, on arrival overseas. The story must, of course, reach us while it is still news.

Send your export photographs to the Editor, *Trade and Industry*, Room 439, 1 Victoria Street, London SW1H 0ET.

Production in the cotton industry

Statistics issued by the Textile Statistics Bureau show that in the period January-May 1976 the amount of cloth woven was 2 per cent more than in January-May 1975. Production of single yarn increased by 10 per cent and doubled yarn increased by 2 per cent

Production in the cotton industry

Annual totals and weekly averages

	Single yarn (†)		Doubled yarn		Woven cloth	
	Cotton yarn (‡)	Spun man-made yarns and mixture yarn, inc. waste	Cotton yarn	Other	Cotton	Man-made fibre and mixtures
	million kg.				million metres	
1968	171.2	67.5	49.9	52.0	668.2	507.3
1969	166.2	73.2	46.8	60.9	661.5	538.1
1970	158.7	77.4	43.2	57.3	627.6	484.3
1971	133.0	83.3	85.0		559.1	479.8
1972	121.4	81.7	75.4		513.0	469.8
1973	115.4	92.5	82.1		453.2	502.3
1974	101.3	87.7	74.7		409.5	505.3
1975	94.4	76.4	68.4		405.4	503.0
1975 January*	1.8	1.5	1.4		8.2	9.7
February	1.9	1.6	1.5		8.8	10.7
March	1.7	1.3	1.3		8.3	9.7
April*	1.8	1.6	1.2		7.7	9.4
May	2.1	1.7	1.5		8.1	10.0
June	1.7	1.6	1.3		8.7	10.1
July*	1.5	1.1	1.1		5.4	7.2
August	1.9	1.5	1.3		8.0	9.4
September	1.4	1.0	1.1		6.4	8.8
October*	2.1	1.6	1.4		8.5	10.9
November	2.1	1.6	1.4		8.7	10.9
December*	1.5	1.2	1.0		5.7	7.8
1976 January	2.3	1.5	1.4		8.6	11.0
February	2.2	1.4	1.4		8.3	10.8
March*	2.3	1.5	1.4		8.3	10.5
April	1.9	1.4	1.2		6.6	8.7
May	2.4	1.7	1.5		8.0	10.5

(†) Spun in the cotton industry. (‡) Including yarns wholly of cotton waste and mixture yarn of cotton and cotton waste. * Average of five weeks.

Detailed statistics of UK overseas trade

Each month the Overseas Trade Statistics give a considerable amount of detail about United Kingdom imports, exports of commodities and, for many of them the most important countries. The information in these statistics is a summary of much more detailed information. This is derived from declarations made by traders to HM Customs and Excise under the descriptions in the Tariff and Overseas Trade Classification (which has over 11,000 commodity headings); there are 199 specified countries.

The fully detailed information is not published on a monthly basis but, when circumstances allow. HM Customs and Excise can supply detailed information about trade under individual descriptions of the Tariff and Overseas Trade Classsification and with individual countries or through United Kingdom ports, either for particular months or for longer periods. A charge is made which covers the cost of the service.

Applications should be made to the Statistical Office, Bill of Entry Section, HM Customs and Excise, 27 Victoria Avenue; Southend-on-Sea, Essex, SS2 6AL (Tel. Southend (0702) 49421, ext. 316 or 323 for Imports, or ext. 314 or 315 for Exports; Telex 99112 CUSEX Southend).

Sales by wholesale textile houses in May

Sales by wholesale textile houses in May showed no change on a year earlier, compared with decreases of 1 per cent in March and 9 per cent in April.

The value of stocks at the end of May showed an increase of 2 per cent compared with the same period last year.

TABLE 1 Total sales and stocks

Index numbers and *percentage increase compared with a year earlier* 1950 = 100

	Value of home sales		Value of stocks end period	
1966	110	*–3*	..	..
1967	104	*–5*	..	..
1968	108	*4*	..	..
1969	103	*–5*	..	..
1970	107	*4*	..	..
1971	115	*8*	..	..
1972	121	*5*	..	..
1973	134	*11*	..	..
1974	147	*9*	..	..
1975	147	*1*	..	..
1973 1st quarter	120	*18*	184	*12*
2nd quarter	123	*11*	171	*17*
3rd quarter	130	*6*	173	*12*
4th quarter	163	*10*	204	*21*
1974 1st quarter	134	*12*	189	*3*
2nd quarter	131	*7*	202	*18*
3rd quarter	148	*13*	194	*12*
4th quarter	173	*6*	198	*–3*
1975 1st quarter	143	*7*	219	*16*
2nd quarter	135	*3*	197	*–2*
3rd quarter	146	*–1*	193	*–1*
4th quarter	165	*–5*	224	*13*
1976 1st quarter	133	*–8*	234	*7*
1975 May	128	*4*	213	*3*
June	130	*–2*	197	*–2*
July	125	*7*	210	*2*
August	126	*–11*	206	—
September	186	*1*	193	*–1*
October	193	*–6*	197	*3*
November	150	*–3*	231	*4*
December	153	*–4*	224	*13*
1976 January	86	*–12*	213	*4*
February	138	*–11*	227	*6*
March	174	*–1*	234	*7*
April	136	*–9*	208	*7*
May	128	—	217	*2*

TABLE 2 Analysis by department

Percentage increase compared with a year earlier

	Sales		Stocks‡
	May '76	Jan.-May '76	May '76
Women's knitted outerwear, blouses and skirts	47	12	4
Women's coats, costumes, furs and raincoats	8	16	5
Women's underwear	14	–9	6
Women's hose and children's socks	6	–11	–3
Women's millinery	–10	–6	–2
Haberdashery, ribbons and wool	18	–2	–20
Children's wear	9	3	14
Men's and boys' shirts, pyjamas and outfitting	–14	–4	17
Gloves	47	7	–15
Piece-goods and nets	24	5	51
Household textiles	16	3	37
Floor coverings, furniture and hardware	–10	–13	—
Boots and shoes	37	5	–2
Total†	—	–6	2

† Including some items not included among the sub-headings.
‡ Values at cost.

Note

These statistics are prepared by Textile Distributor's Association. Inquiries should be addressed to the Secretary, the Textile Distributors' Association, 3 Berners Street, London W1P 4JP (tel. 01-580 2902).

Made-up clothing: orders and deliveries

In the three months ended March 1976, deliveries by the clothing industry were provisionally estimated to have been 6 per cent higher than in the preceding three months while net new orders were 1 per cent higher. Orders-on-hand at the end of March 1976 were 9 per cent lower than the end-December 1975 level. (These comparisons are based on the seasonally adjusted series in the accompanying table.)

In using the index numbers shown in the table, it should be borne in mind that, when price increases are large, the various problems associated with constructing a constant value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent months.

Made-up clothing

Index numbers of total orders and deliveries

	Orders-on-hand (end period)		Net new orders		Deliveries	
	December 1969 = 100		Average 1970 Deliveries = 100		Average 1970 Deliveries = 100	
1968	107		100		97	
1969	100		97		97	
1970	103		102		100	
1971	119		108		104	
1972	125		110		109	
1973	155		123		117	
1974	145		115		114	
1975	143		119		116	
	Actual	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Seasonally adjusted
1974 1st quarter	164	161	111	115	107	108
2nd quarter	171	149	122	113	113	115
3rd quarter	137	143	96	113	115	117
4th quarter	145	145	129	118	122	118
1975 1st quarter	135	139	116	124	116	121
2nd quarter	164	149	131	118	113	111
3rd quarter	132	145	99	117	116	118
4th quarter	143	150	128	117	117	112
1976 1st quarter	132	137	114	118	118	119
1974 April	171	163	133	122	115	114
May	182	155	134	109	108	113
June	171	149	100	107	117	118
July	156	149	85	113	112	116
August	143	143	86	112	105	118
September	137	143	116	114	129	116
October	142	140	150	115	141	120
November	152	141	153	122	130	118
December	145	145	85	116	96	115
1975 January	138	137	101	119	103	124
February	134	136	121	123	125	122
March	135	139	124	129	120	119
April	147	146	134	111	117	106
May	166	148	145	119	108	114
June	164	149	115	124	113	114
July	148	148	86	115	112	117
August	135	142	86	111	106	119
September	132	145	126	125	131	118
October	135	140	155	118	135	115
November	145	140	139	110	121	111
December	143	150	91	124	93	111
1976 January p	135	134	98	116	107	128
February p	134	137	120	122	122	118
March p	132	137	123	116	125	112

Production of man-made fibres in May

In the three months ended May 1976 the volume of production of man-made fibres, seasonally adjusted, was estimated to have been 3 per cent less than in the three months ended February 1976. Total production by weight of man-made fibres in the period January-May 1976 was 15 per cent higher than in January-May 1975, output of continuous filament increased by 18 per cent and staple fibre increased by 14 per cent.

Man-made fibre production

Thousand metric tons

	Total	Continuous filament (singles)	Staple fibre
1968	539.1	241.8	297.4
1969	553.9	252.5	301.5
1970	599.4	257.6	341.9
1971	613.1	276.4	336.7
1972	626.5	264.0	362.5
1973	730.8	305.6	425.3
1974	627.6	271.0	356.6
1975	562.5	246.5	316.0
1974 1st quarter	174.0	69.9	104.1
2nd quarter	175.1	71.7	103.4
3rd quarter	149.9	67.1	82.7
4th quarter	128.6	62.3	66.3
1975 1st quarter	129.1	56.4	72.7
2nd quarter	148.8	61.9	86.9
3rd quarter	134.1	58.5	75.7
4th quarter	150.4	69.7	80.7
1976 1st quarter	159.8	70.0	89.8
1975 January	42.1	18.2	24.0
February	42.6	17.6	25.0
March	44.3	20.6	23.7
April	48.1	20.0	28.1
May	53.6	22.3	31.4
June	47.0	19.6	27.4
July	47.0	19.3	27.7
August	40.8	17.9	22.8
September	46.3	21.2	25.1
October	55.1	24.0	31.1
November	49.1	23.6	25.5
December	46.2	22.1	24.1
1976 January	53.3	24.1	29.2
February	52.3	22.6	29.7
March	54.1	23.2	30.9
April	53.1	22.1	31.0
May	53.6	23.9	28.6

Index of the volume of production

1970 = 100

1968	87	
1969	92	
1970	100	
1971	106	
1972	107	
1973	127	
1974	111	
1975	101	
	Actual	Seasonally adjusted
1974 1st quarter	120	118
2nd quarter	119	116
3rd quarter	109	116
4th quarter	96	95
1975 1st quarter	92	91
2nd quarter	104	101
3rd quarter	96	101
4th quarter	112	111
1976 1st quarter	116	114
1975 January	85	83
February	95	97
March	96	93
April	103	102
May	111	109
June	98	93
July	95	100
August	89	99
September	103	105
October	116	110
November	114	112
December	105	110
1976 January	116	113
February	118	120
March	113	108
April	115	114
May	114	111

The actual figures allow for differences in the length of calendar months but not for holidays or other seasonal variations. The seasonally adjusted figures are based on the seasonal pattern up to the end of 1974, and may be subject to slight revision when the complete figures for 1975 are incorporated.

Tel. 01-212 0017 or 01-212 6474.

Footwear industry: orders, deliveries and stocks

In the three months ended April 1976 deliveries were estimated to be 12 per cent lower, on a seasonally adjusted pairage basis, than in the three months ended January 1976. Net new orders were 1 per cent lower than in the previous three months, while at the end of April orders on hand were 1 per cent up on the January 1976 level. The index of output in the three months ended April 1976 was 10 per cent lower than in the three months ended January 1976.

A detailed breakdown of manufacturers' deliveries by type of footwear in pairage and value terms, together with figures of exports, imports, consumers' expenditure, prices and employment is published in the Business Monitor Production series under the reference PQ 450.

The index of output is calculated from the value of total sales and work done by firms classified to the footwear industry (Minimum List Heading 450 of the Standard Industrial Classification). In using the index numbers it should be borne in mind that when price increases are large, the various problems associated with constructing a constant price value series become more acute. Because of these difficulties the relative accuracy of the estimates is likely to have been reduced in recent months.

The data on pairage and value relate to complete footwear only sold by manufacturers, classified to MLH 450 and to other industries (eg rubber) in the SIC, employing 25 or more persons.

Index of output: Orders on hand, net new orders, deliveries and stocks of complete footwear

Monthly averages or monthly totals

	Index of output 1970 = 100	Orders on hand (end period)			Net new orders			Deliveries			Stocks (end period)
		Million pairs		£ million	Million pairs		£ million	Million pairs		£ million	Million pairs
1966		33.6			..			16.4			
1967		37.8			16.5			16.1			
1968	113	41.6			17.3			17.0			
1969	108	34.6			15.9			16.5			
1970	100	38.9			16.6			16.2			
1971	108	32.5		55.7	15.7			16.2		23.8	19.4
1972	104	29.5		59.6	15.2		24.8	15.4		24.5	18.5
1973	108	46.2		85.2	17.1		30.5	15.7		28.4	16.5
1974	107	44.3		79.5	14.3		30.9	14.4		31.3	18.0
1975 p	101	38.4		90.6	13.1		35.7	13.5		34.7	15.8
	Seasonally adjusted	Actual	Seasonally adjusted	Actual	Actual	Seasonally adjusted	Actual	Actual	Seasonally adjusted	Actual	Actual
1974 1st quarter	101	51.1	53.3	87.5	15.2	14.1	29.7	13.6	13.4	28.9	13.6
2nd quarter	112	51.9	50.3	95.1	14.7	14.4	32.6	14.4	15.5	30.0	19.4
3rd quarter	110	40.1	49.1	73.7	11.0	14.1	26.8	14.9	14.5	33.9	16.4
4th quarter	105	44.3	50.0	79.5	16.2	14.8	34.6	14.8	14.5	32.7	18.0
1975 1st quarter	106	35.2	38.2	62.3	11.1	10.4	30.5	14.1	14.3	36.2	18.3
2nd quarter	95	40.8	39.8	82.3	14.1	13.4	37.0	12.2	12.9	30.3	23.1
3rd quarter	101	33.6	42.9	69.2	12.0	14.9	32.5	14.3	13.8	36.8	17.4
4th quarter p	101	38.4	44.9	90.6	15.1	14.0	42.7	13.5	13.3	35.6	15.8
1976 1st quarter p	96	40.2	43.6	86.3	13.2	11.9	37.0	12.6	12.3	38.4	19.0
1975 January	112	38.1	43.1	70.7	8.1	7.8	27.5	14.3	14.7	36.3	
February	108	32.9	37.0	62.3	9.2	8.7	28.7	14.4	14.7	37.1	
March	98	35.2	38.2	62.3	16.1	14.6	35.2	13.7	13.5	35.2	
April	91	39.9	39.4	75.0	17.7	13.8	44.5	13.0	12.6	31.8	
May	90	43.6	40.3	87.8	14.7	13.0	39.9	11.0	12.1	27.2	
June	104	40.8	39.8	82.3	9.8	13.5	26.5	12.7	14.0	32.0	
July	104	34.5	37.1	68.1	7.8	11.1	23.3	14.0	13.8	37.5	
August	96	33.5	40.1	66.8	11.5	16.7	29.7	12.5	13.7	31.0	
September	103	33.6	42.9	69.3	16.6	16.9	44.5	16.5	14.0	42.0	
October p	102	38.1	45.2	86.0	20.8	15.6	58.9	16.3	13.3	42.2	
November p	99	38.4	43.5	91.5	13.7	11.6	40.0	13.4	13.3	34.5	
December p	101	38.4	44.9	90.6	10.8	14.6	29.3	10.9	13.2	30.2	
1976 January p	103	36.7	42.3	85.2	10.7	10.7	31.0	12.4	13.4	36.3	
February p	97	37.7	42.4	86.3	13.3	12.6	39.0	12.2	12.4	37.9	
March p	89	40.2	43.6	86.3	15.6	12.4	41.1	13.1	11.2	41.2	
April p	88	42.7	43.3	91.0	14.0	11.4	38.0	11.5	11.7	33.3	

p = Provisional

Index of retail sales in Northern Ireland in May

The seasonally adjusted index of the value of retail sales in Northern Ireland for May was 246 (1965 = 100), 16 per cent more than in May 1975.

After allowing for price changes, the total volume of sales in May showed no change compared with the corresponding period last year.

The seasonally adjusted index numbers of the value of sales in May and the percentage increases on a year earlier for the main groups of traders are shown below. More detailed information can be obtained from the Department of Commerce, Index of Retail Sales, 21 Linenhall Street, Belfast BT2 8BZ (tel. Belfast (0232) 28081, ext. 140).

		May 1976	
Sales by:	Sales in 1965 – £m	Seasonally adjusted value index numbers 1965 = 100	Percentage increases
All kinds of business	219	246	16
Food shops	97	261	14
Non-food shops	122	232	17
Of which:			
Clothing and footwear shops	36	227	15
Durable goods shops	21	240	18
Miscellaneous non-food shops	43	262	18
Department and general stores	22	181	18

Index of industrial production for Wales

Results for first quarter of 1976

Provisional results of the Index of Industrial Production for Wales show a marked upturn in output in the first quarter of 1976, though the level remained below that for the first quarter of 1975. The All-industries index rose by 6.6 per cent over the fourth quarter of 1975, but stood only 3.9 per cent higher than 1970 levels. By comparison, the UK Index, at 101.2 rose only 0.7 per cent in the first quarter.

While one quarter's provisional figures should not be relied upon too heavily, it is clear, nevertheless, that there are signs of recovery. Mining and quarrying rose by 12.2 per cent to its highest level since mid-1973. In the manufacturing sector, which showed an overall increase of 6.7 per cent, Chemicals and allied industries rose by 9.2 per cent, Ferrous metals by 14.9 per cent, Non-ferrous metals by 11.8 per cent, Textiles, leather and clothing by 11.4 per cent and Bricks, pottery, glass, cement, etc by 8.2 per cent. Smaller increases were recorded in Coal and petroleum products, throughout the Engineering industry, in Paper, printing and publishing and Other manufacturing industries. There were no major falls in output, though Food, drink and tobacco and Timber, furniture, etc registered a marginal drop in activity.

The significantly revised Construction index rose by 2.4 per cent, but still remains at the very low level of 85, while the Utilities index recovered from the low levels of 1975, rising by 7.3 per cent over the quarter.

From this quarter onwards the Index will also be analysed by market sector. Briefly, this means that in addition to the normal disaggregation, in which the index is presented in terms of groups of industries of broadly similar technical nature, it will also be analysed according to the end-use of output, either for Consumption, Investment or Intermediate use, that is, raw materials and goods purchased in order to be further processed. In Wales, this Intermediate sector, which includes the coal and steel industries, is by far the most important.

While both Consumer and Investment sectors have progressed fairly steadily since 1970, growth in the Intermediate sector has been small and its overall level in 1975 was 10 per cent below that of 1970. However, provisional figures for the Intermediate sector show an increase in the first quarter of 1976 of 8.9 per cent over the previous

Index of industrial production for Wales: 1970 based[1]

Seasonally adjusted indices (1970 = 100)

	1970 weights	Annual indices					Quarterly indices 1974	1975				1976
1968 SIC	thousand	1971	1972	1973	1974	1975	4th qtr.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	1st qtr. (2)
Total: all industries	1,000	100.1	107.2	112.6	107.1	99.2	105.7	106.6	97.2	95.5	97.5	103.9
Mining and quarrying	85	101	81	82	62	73	70	75	72	70	74	83
Total: all manufacturing industries	701	101.0	108.5	116.9	111.7	102.3	107.5	109.7	99.0	99.9	100.9	107.7
Food, drink and tobacco	40	106	112	120	134	146	138	146	148	149	143	139
Coal and petroleum products	37	103	98	106	129	98	126	103	104	93	94	99
Chemicals and allied industries	47	118	125	131	142	127	140	123	120	124	141	154
Metal manufacture	199	94	99	102	86	72	83	95	62	64	67	77
Ferrous	166	94	101	99	79	65	77	91	52	56	60	70
Non-ferrous	33	94	89	114	121	108	112	112	109	108	102	114
Engineering and allied industries: total	222	101	106	118	118	116	114	117	117	115	115	120
Mechanical and instrument engineering	62	96	96	110	115	105	116	108	109	102	98	101
Electrical engineering	56	104	113	140	137	150	131	148	149	155	150	154
Vehicles (including aircraft and shipbuilding)	65	106	112	110	109	108	102	105	108	104	116	123
Metal goods not elsewhere specified	39	97	103	113	113	99	105	107	101	97	92	96
Textile, leather and clothing	59	104	127	123	107	95	91	97	95	99	88	98
Bricks, pottery, glass, cement, etc.	20	127	133	152	135	121	128	119	116	126	122	132
Timber, furniture, etc.	13	109	128	150	124	131	116	128	129	131	136	135
Paper, printing and publishing	31	86	98	116	94	70	79	75	66	69	72	74
Other manufacturing industries	32	103	125	147	145	135	153	140	126	136	137	143
Construction (3)	146	99	103	102	92	90	97	98	93	85	83	85
Gas, electricity and water	68	92	135	130	149	120	151	133	119	104	123	132

Source: Welsh Office.

UK Index – key components

Total: all industries	1,000	100.5	102.6	110.3	106.4	101.1	104.8	104.6	99.8	99.3	100.5	101.2
Mining and quarrying	37	100	84	94	82	87	91	88	85	83	90	87
Total: all manufacturing industries	745	99.7	102.4	110.9	107.8	101.4	105.7	106.1	100.0	99.5	100.1	101.4
Construction	146	103	105	108	98	94	94	94	93	94	93	94
Gas, electricity and water	72	104	111	118	120	121	124	120	121	117	125	123

Source: Central Statistical Office

(1) The annual review of the Welsh index, necessary for technical as well as other reasons, has resulted in the indices given above differing in some cases from those published previously. Those interested in receiving the revised series should apply to Economic Services Division, Welsh Office, Cathays Park, Cardiff (tel. Cardiff (0222) 28066 ext. 394.

(2) Provisional.

(3) The Construction figures for 1975 are markedly lower than previously shown, due to the basic figure received for the fourth quarter subsuming an incorrectly 'phased' output value.

Index of industrial production for Wales: 1970 based Market sector analysis

Seasonally adjusted indices (1970 = 100)

	1970 weights	Annual indices					Quarterly indices 1974	1975				1976
	thousand	1971	1972	1973	1974	1975	4th qtr.	1st qtr.	2nd qtr.	3rd qtr.	4th qtr.	1st qtr. (1)
Consumer goods sector	137	104.6	119.7	136.1	127.9	128.0	128.1	126.0	125.7	129.6	130.5	134.5
Intermediate goods sector	594	99.1	106.0	108.0	101.9	90.1	98.5	98.6	88.2	85.0	88.7	96.6
Investment goods sector	123	101.5	102.6	124.2	129.1	122.6	128.5	125.5	120.1	121.0	123.5	128.7

Source: Welsh Office.

UK Index

Consumer goods sector	249	102.7	109.9	118.9	116.7	110.7	114.5	115.6	109.5	109.1	108.7	109.1
Intermediate goods sector	363	99.2	101.1	109.6	105.2	97.9	104.0	102.4	95.6	94.3	99.1	101.3
Investment goods sector	238	98.4	96.3	102.9	102.3	100.5	102.6	103.3	100.5	99.9	98.2	97.7

Source: Central Statistical Office.

(1) Provisional.

quarter – a larger rise than that registered in either of the other two sectors.

Comparisons of the performance of each of the market sectors in Wales vis-a-vis the UK as a whole is difficult due to their markedly different industrial structure. Nevertheless, it is clear that both the consumer and investment goods aggregates in Wales have grown at a faster rate than nationally, while in contrast the intermediate sector has lagged somewhat behind its growth in the UK as a whole.

Notes

Many of the series used in compiling the Index, in particular for manufacturing industry, measure sales out of the factory rather than production over a particular period. Sales and production in a quarter may differ because of movements in stocks. While this distinction is generally not important in interpretation it can be significant in periods when output is interrupted and during the subsequent recovery. It has been estimated that in the case of the United Kingdom Index, because of the difference between deliveries and production, the All-industries index probably overstated the level of output by about ½ per cent in the third and fourth quarters of 1975 and understated by about ½ per cent in the first quarter of 1976.

About one half of the index of production is derived by the revaluation to the prices of 1970 of data expressed at current prices. When the rate of change of prices is relatively large, or itself changes rapidly, the problems associated with this revaluation become more acute. For this reason the estimates for periods since about the end of 1973 should be regarded as subject to wider margins of error than in earlier years.

The index numbers in this notice are all seasonally adjusted. Seasonal adjustment removes any annually recurring quarter to quarter variations due, for example, to the incidence of holidays.

When information becomes available for a complete year it is necessary to amend previously published seasonally adjusted index numbers to ensure that their average for a year equals that of the unadjusted index numbers. Revision to the latest quarter's figures are also necessary when more complete information becomes available.

The overall index, and that for all manufacturing industries obviously reflects the composition of industry in Wales. This differs markedly from that nationally. For example Ferrous metals has a 16.6 per cent weighting in Wales, while nationally its weight is 4.3 per cent; Engineering and allied industries in the Welsh index has a weight of 22.3 per cent, nationally its weight is 31.9 per cent. These structural differences must be borne in mind when comparing changes in the Welsh and national indices.

In the past the Welsh Index has been analysed solely in terms of industries of a broadly similar technical nature. Goods produced by similar methods may, however, differ markedly in their end-use; they may be bought by the private consumer, or purchased by industry for further processing or as investment goods. In recognition of this fact, and in an attempt to determine the direction from which demand originates, the Welsh Index will from now onwards also be analysed in terms of market sector aggregates. The only major industry excluded from this analysis is Construction. The industrial make-up of each of the three sectors is basically similar to that adopted for the United Kingdom as a whole, and outlined in 'The measurement of changes in production' HMSO 1976. The only major difference between the composition of the sectors in Wales and the UK results from the motor vehicle industry is Wales being allocated (by virtue of its structure) to the intermediate rather than the consumer sector. The relative importance of the different sectors in Wales can be judged by their percentage contribution to overall output (United Kingdom percentages in brackets): Consumer goods industries, 13.7 per cent (24.9 per cent); Investment goods industries, 12.3 per cent (23.8 per cent); Intermediate goods industries, 59.4 per cent (36.3 per cent). The various percentages do not sum to 100 due to the exclusion of the construction industry.

Manufacturers' stocks in May

It is estimated that manufacturers' stocks increased by about £80 million at 1970 prices, seasonally adjusted, in May, reversing the fall of the last two months. There is thought to have been a large rise in finished goods stocks with a moderate rise in work in progress and little change in materials and fuel stocks.

Monthly figures from January 1975 are shown below:

		£ million, 1970 prices seasonally adjusted
1975	January	no change
	February	+40
	March	−40
	April	no change
	May	−10
	June	−100
	July	−60
	August	−50
	September	−100
	October	−90
	November	+10
	December	+10
1976	January	+20
	February	+40
	March	−40
	April	−30
	May	+80

Registrations of British, community and foreign films

The following are details of films registered by the Department of Trade under the Films Acts 1960 to 1970, as amended by the European Communities Act 1972, during the week ended Friday, 23 July 1976.
BR/E indicates that the film is a British quota film, EC that the film is a quota film. The date which forms part of the registration number of each is the date on which quota life of the film expires.

Title of film	Registered no.	Playing time minutes	Date of registration	Registered in the name of	Maker's name
			BRITISH		
Confessions Of A Driving Instructor	BR/E 38703/25/7/81	90	21 July	Columbia-Warner Distributors Ltd.	Swiftdown Ltd.
The Sailor Who Fell From Grace With The Sea	BR/E 38704/25/7/81	105	22 July	Fox-Rank Distributors Ltd.	Haworth Productions Ltd.
Movietone News 2459	BR/E 38625/25/7/81	8	23 July	British Movietonews Ltd.	British Movietonews Ltd.
			COMMUNITY		
Confessions Of A Sexy Photographer	EC 38702/25/7/81	81	21 July	Mark Associates Ltd.	TV 13 Fernseh and Filmgesellschaft mbH, Munich
			FOREIGN		
The Outlaw Josey Wales	F 38700	135	21 July	Columbia-Warner Distributors Ltd.	Malpaso Co., California
Baby Blue Marine	F 38701	89	21 July	Columbia-Warner Distributors Ltd.	Spelling-Goldberg Productions Inc., California
The Omen	F 38705	111	23 July	Fox-Rank Distributors Ltd.	Twentieth Century-Fox Productions Ltd., London

Correction to the Register
The registration number of the film 'Aces High', registered on 20 May 1976, has been corrected to BR/E 38605/C/23/5/81.

Amendments to the Register
The registration number of the film 'Under-graduate Girls', registered on 15 July 1976, has been amended to EC 38698/18/7/81 and the maker's name to read 'Dania Film SAS Rome'.
The title of the film 'The Story of "Q" ' (F 38494), registered on 12 March 1976, has been amended to read 'French Tickler.'

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PQ 240	Tobacco for first quarter 1976
PQ 272	Pharmaceutical chemicals and preparations for first quarter 1976
PQ 323	Miscellaneous non-ferrous metals for first quarter 1976
PQ 362	Insulated wires and cables for first quarter 1976
PQ 370	Ship and boat building, repairing and marine engineering for fourth quarter 1975
PQ 381.1	Motor vehicle manufacturing for first, second and third quarters 1975
PQ 382	Motor cycles and pedal cycles for first quarter 1976
PQ 399.5	Drop forgings, etc. for first quarter 1976
PQ 399.8	Needles, pins, fish-hooks and other metal small-wares for first quarter 1976
PQ 399.9	Domestic gas appliances for first quarter 1976
PQ 421	Narrow fabrics for first quarter 1976
PQ 429.1	Asbestos for first quarter 1976
PQ 445	Women's and girls' light outerwear, lingerie, infants' wear, etc. for first quarter 1976
PQ 499.1	Corsets and miscellaneous dress industries for first quarter 1976
PQ 461.2	Clay building bricks and other non-refractory goods for first quarter 1976
PQ 464	Cement for first quarter 1976
PQ 484.2	Miscellaneous manufactures of paper and board for first quarter 1976
PQ 496	Plastics products for fourth quarter 1975
PQ 499.1	Musical instruments for first quarter 1976

Miscellaneous series

Quarterly:

M 5	Insurance companies and private pension fund investment for first quarter 1976

Annual:

M 10	Overseas trade analysed in terms of industries for 1975

Business Monitors in the Production series and Miscellaneous series, and certain Monitors (Nos. SD 1 and SD 9) in the Service and Distributive series, are normally available by annual subscription from Her Majesty's Stationery Office, PO Box 569, London SE1 9NH. Copies of specific issues (including back issues) can be ordered by post (payable in advance) from the Library at the Business Statistics Office, Cardiff Road, Newport, Gwent NPT 1XG (tel. 0633 56111, ext. 2973; telex 497121/497122 – Answer back BSO Newport), from which a complete list of the titles of Business Monitors is available on application. Back issues of the monthly and quarterly Monitors cost 30p a copy post free. The annual Monitors are individually priced and the cost of these will be supplied on request. Exceptionally, copies can also be purchased over the counter at the Department's Statistics and Market Intelligence Library, Export House, 50 Ludgate Hill, London EC4M 7HU.

The Annual Census of Production Reports (the PA series of Monitors) and the 1971 Census of Distribution Reports (which are being published as Monitors SD 10 to SD 23, though not all are yet available) can be obtained on standing order from Her Majesty's Stationery Office, PO Box 569, London SE1 9NH, or can be purchased separately from the Government bookshops or through booksellers.

New companies registered

Below are details of new companies registered in Great Britain during June 1976 showing nominal capital. The figures are exclusive of unlimited companies and companies limited by guarantee.

Nominal capital	Total	Public companies	Private companies
Not exceeding £100	3,798	—	3,798
Over £100 but under £1,000	91	—	91
£1,000 but under £10,000	1,157	—	1,157
£10,000 but under £50,000	441	—	441
£50,000 but under £100,000	64	—	64
£100,000 but under £1,000,000	69	—	69
£1,000,000 and over	4	—	4
Total number	5,624	—	5,624
	£ thous.	£ thous.	£ thous.
Total amount of nominal capital	25,815	—	25,815

Companies registered in Great Britain in 1975 and 1976.

	1975		1976	
	Number	Nominal capital £ thous.	Number	Nominal capital £ thous.
January	3,648	18,631	3,476	21,780
February	3,442	22,886	4,088	19,228
March	3,478	22,419	6,190	41,680
April	4,944	24,352	4,150	22,354
May	4,245	42,314	4,343	25,095
June	3,465	20,856	5,624	25,815
July	3,752	26,703		
August	3,267	47,668		
September	3,781	32,241		
October	3,879	25,224		
November	3,739	35,028		
December	3,450	27,881		
Total	45,090	346,203		

PRIVATE COMPANIES INCORPORATED IN ENGLAND AND WALES WITH NOMINAL CAPITAL OF £1 MILLION AND OVER

Name	Number	Date of incorporation	Nominal capital	Objectives
Wilderwick Ltd.	1,263,376	16.6.76	£1 million	Commercial and Industrial Holdings
Canon Copiers (UK) Ltd.	1,264,300	21.6.76	£1 million	Dealers in Electronic copying machines
Transworld Confirmers (London) Ltd.	1,264,906	23.6.76	£1 million	Importers and exporters
Hawser Ocean Services Ltd.	1,266,113	29.6.76	£1 million	Shipping agents

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Index to statistics and organisational information published regularly in 'Trade and Industry'

A = annually M = monthly Q = quarterly 6M = every six months.

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